



Infor CloudSuite Distribution Release Notes for 2021

December 2021 Production Update

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About this document

This document provides information about the enhancements and changes in CloudSuite Distribution for calendar year 2021. Enhancements and changes are organized by monthly update. Details of previous updates for this year are also included in this document.

See the Resolved Issues document for the list of fixed issues that are included in this update.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://conciierge.infor.com/> and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: December 2021 Production Update

This section describes the details of the December 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **December 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution Sx.e, organized by module or component.

Customer

These new features or product improvements were made to the Customer module.

New features

These new features were added to the Customer module.

Accounts Receivable homepage available

A pre-defined homepage for accounts receivable clerks, analysts, or managers is now available in InforMing.le. Each widget on the homepage is designed to assist users in monitoring accounts, performing tasks, and resolving issues.

The homepage includes these types of widgets:

- **Birst**
Shows a CloudSuite Distribution Analytics dashboard that contain role-based information. The individual widgets in the banner widget represent a Birst report. Click **Explore** to view the report in Birst.
- **ION**

Shows alerts for monitors and workflows that are set up by your system administrator in ION. Users can assign alerts to themselves and then mark them as complete.

- **Distribution SX.e**

Shows data from Distribution SX.e without opening the application.

These widgets are included on the homepage:

- Accounts Receivable banner widget comprised of these widgets:
 - AR Invoice Aging Report
 - Top 5 Customers by AR Balance
 - Top 5 Delinquent Customers
- Customer Lookup
- Customer Open Orders
- Customer Period Balance
- Credit Hold Approval
- Change of Credit Limit
- New Customer Created
- Invoice Processing Exception
- Menu

See the *Infor Distribution SX.e User Guide* for information about each widget.

Feature activation

The Accounts Receivable homepage is available in the Page Catalog on the Homepage view in Infor Ming.le. To add the page to the Homepage view, the SX-AccountsReceivable security role must be assigned to a user's Infor Ming.le user record. Users who can sign in to more than one company must configure the lookup widgets to specify the company and user ID from which to retrieve the information.

To display alert and tasks in the ION widgets, the SXe_Accounts_Receivable group must be included on the distribution list for the related monitors, workflows, or activation policies in ION Desk. To view content in the ION widgets, the SXe_Accounts_Receivable group must be assigned to the user's Infor Ming.le user record. To view the Birst widgets, the SXBIRST-User role must be assigned to the user's Infor Ming.le user record.

See the *Infor CloudSuite Distribution Configuration Guide*.

Product improvements

These product improvements were made to the Customer module.

ION content XML files for Customer Service homepages renamed

The .xml files that are required to activate ION widgets on the Customer Service homepage were renamed. The files now use a naming convention that meets this criteria:

- All files have an SX_<HomepageAcronym>_ prefix.
- Alert monitors are appended with _Alert.
- Workflows are appended with _WF.
- Activation policies are appended with _AP.

For example, SX_Quote_Exp.xml was updated to SX_CSR_Quote_Exp_Alert.xml.

The .xml files for the ION widgets on the Accounts Payable, Accounts Receivable, and Purchasing homepages also meet the naming convention. The files are available from the Infor Support Portal, attached to knowledge base article 1887404. We recommend you monitor and download new content when it is available.

Distribution Analytics for Birst

These new features or product improvements were made to the Distribution Analytics content for Infor Birst.

New features

These new features were added to the Distribution Analytics content for Birst.

Data validation reports available

Data validation reports are now included in the new **Content Validation** dashboard collection in CloudSuite Distribution Analytics. The new Birst Visualizer reports provide specific points of comparison with similar CloudSuite Distribution reports to help you identify discrepant data. You can now compare each data validation report to its respective CloudSuite Distribution report, and if the reports do not match, you can investigate further to understand the reason for the discrepancy. This table shows the data validation report dashboards that are now available:

Report dashboard	Description
Payables by Vendor	Validate accounts payable (AP) data by comparing the Vendor Period Analysis Report with these data validation reports: <ul style="list-style-type: none"> • Open Payable Summary by Vendor • Open Payable Detail by Vendor • Open Payables Aging
Receivables by Customer	Validate accounts receivable (AR) data by comparing the Customer Period Analysis Report with these data validation reports: <ul style="list-style-type: none"> • Open Receivables Summary by Customer • Open Receivables Detail by Customer • Open Receivables Aging
Sales Summary by Salesrep	Validate sales summary data by comparing the SM Sales Analysis Report with the Sales Summary by Salesrep data validation report.
Sales Detail by Customer	Validate sales detail data by comparing the SM Sales Analysis Report with the Sales Detail by Customer by Rep data validation report.

Report dashboard	Description
General Ledger Trial Balance	Validate general ledger (GL) data by comparing the GL Trial Balance Report with the Trial Balance by GL Account data validation report.
Purchase Summary by Vendor	Validate purchasing summary data by comparing the Purchase PO Purchase Analysis Report with the Purchase Summary by Vendor data validation report.
Purchase Detail by Vendor	Validate purchasing detail data by comparing the Purchase PO Purchase Analysis Report with the Purchase Detail by Vendor by Product data validation report.
Inventory Turnover	Validate inventory data by comparing the Product Turnover Analysis Report with these data validation reports: <ul style="list-style-type: none"> • Inventory Turnover Summary • Inventory Turnover Detail
Inventory Trial Balance	Validate inventory data by comparing the Product Trial Balance of Stock Inventory Report with the Inventory Trial Balance data validation report.

Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

New features

These new features were added to support the integration to Infor Service Management.

Sales Order Status field integrated with Service Management

You can now prevent the creation of new service orders, contracts, and incidents in Service Management based on the **Sales Order Status** field **Customer Setup-Credit** in Distribution SX.e.

The **Sales Order Status** field is now integrated with and affects the new **Sales Order Status** field on the **Customers** form in Service Management. If the **Sales Order Status** field is set to **No**, then new service orders, contracts, and incidents are not created for the customer in Service Management.

In Distribution SX.e, other **Sales Order Status** field options such as **Yes**, **Cash Only**, **COD Only**, **Hold Until**, and **Open Until** are displayed as **Yes** in Service Management and does not affect the creation of new service orders, contracts, incidents.

Feature activation

To enable this functionality, specify **arsc.selltype** in **Level 1 Fields** in the Extra Fields section of the CustomerPartyMaster BOD in **SA Administrator ION Noun Setup**.

Additional Service Management forms available in Distribution SX.e

These Service Management forms can now be accessed from parent forms that are available in Distribution SX.e:

Form	Parent form
Incident Lines	Incident
Order Working Status History	Service Orders

Online help for the forms is maintained in the Service Management documentation library. When you are working in Distribution SX.e, the forms are updated to match Distribution SX.e design standards. Additionally, fields that do not pertain to the integration between Distribution SX.e and Service Management are removed. In Distribution SX.e, use the Smart Help context application to access help content for the forms. Click a link in the Smart Help to open the Service Management documentation library in another tab.

The Distribution SX.e version of the Service Management forms are also available in Service Management. The name of Distribution SX.e versions of the form are annotated with an .sxe suffix, for example, **IncidentLines.sxe**.

Feature activation

You must specify the Service Management application URL in **SA Administrator Options-Integrations-Service Management** to enable the forms and data to display in Distribution SX.e. Operator access to the Service Management module and the individual forms is determined by standard functional security in **SA Operator Setup**. Operator access to forms that are accessed from a parent form is based on the security for the parent form.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

Product improvements

These product improvements affect multiple functions in the application.

Transaction search supported by Activities context application

You can now search for transaction-related activities in the Activities context application. A **Document Type** field was added to the Search panel on each tab of the expanded **Activities** window. You can select **Order Entry**, **Purchase Order**, **Warehouse Transfer**, or **None**. When you select a value other than **None**, a document number lookup field becomes available. Use the **Document Type** field in conjunction with document number field to search for activities associated with a specific document number. You can also use the **Document Type** field independently of the document number field.

When you access the **Activities** window from a transaction-related function, default values are displayed for the document type and document number. The default values are based on the open transaction. When you access the **Activities** window in a function that is related to customer or vendor entities, the **Document Type** field is blank. Leave the field blank, or select **None**, to include all document types in the search results.

Another Activities improvement is available in the December release. When you access the Activities context application from the **Purchase Order Line Detail** page in **Vendor Invoice Center Entry**, purchase order-related content is now available. Previously, in-context information at the header and line levels was not provided to the application for the page.

Drillbacks completed after sign in

When you click a drillback to a Distribution SX.e record in another application before you are signed into Distribution SX.e, the screen that corresponds to the drillback now opens in Distribution SX.e after you sign in. For example, when you click a drillback to a sales order in an Infor Mingle widget, **Sales Order Inquiry** is opened after you sign in. Previously, you were prompted to sign in to Distribution SX.e, but the screen that corresponded to the drillback did not open.

When the accounting entity, or company, for a drillback does not match the company that you signed in to, the drillback is ignored. When a drillback does not have an accounting entity, the company that you signed in to is used for the drillback.

Warning indicates enforcement of default record limit in advanced searches

This warning message is now displayed in functions where the default record limit is enforced when you clear the **Record Limit** field, or specify 0 in the field, during an advanced search:

Clearing the Record Limit is not allowed. It was reset to the Default Record Limit.

The warning is displayed in these functions:

- **KP Work Order Inquiry**
- **Product Cartonization Center Entry**
- **Product Cartonization Package Setup**
- **Purchase Order Inquiry**
- **RS Activity Administration**
- **SA Journal Setup**
- **Sales Order Fulfillment Inquiry**
- **Sales Order Inquiry**
- **TWL Outbound Order Drop Manager**
- **TWL Outbound Shipping Manifest**
- **VA Cut Allocations Entry**
- **VA Order Inquiry**
- **Warehouse Transfer Inquiry**
- **WL Transaction inquiry**

When you specify a record limit that is greater than or less than the default value, it is honored during an advanced search. The warning displays only when the **Record Limit** in the **Advanced Search** window is blank or zero. You must click **Reset** to restore the default record limit in the **Record Limit** field. Otherwise, the field remains blank or retains the zero value.

Note: The default record limit is set up in **SA Business Rule Setup**.

Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

New features

These new features were added to the Pricing and Discounting module.

PD cost change functions support foreign replacement costs

To enable scheduled updates of warehouse products records with foreign replacement costs, these functions now support the foreign replacement cost setup and processing:

- **PD Change Price and Cost Entry**
- **PD Administrator Price/Costs Update Report**
- **PD Future Price/Cost Change Setup**
- **PD Administrator Future Price/Costs Report**

The fields related to the foreign replacement cost are now available in **PD Future Price/Cost Change Setup** and **PD Change Price and Cost Entry**. The fields are **Changed By**, **New Value**, and **Current Value**. The **Current Value** field cannot be edited. The value reflects the current foreign replacement cost on the **Product Warehouse Product Setup-Costs** record.

You can use **PD Future Price/Cost Change Setup**, **PD Change Price and Cost Entry**, and **PD Administrator Price/Costs Update Report** to update foreign replacement costs instead of editing the value directly on **Product Warehouse Product Setup-Costs** records. If you use **PD Future Price/Cost Change Setup**, you must run the **PD Administrator Future Price/Costs Report** to update the product warehouse records. Two new options, **For Repl-(N)ew,(D)Amt,(P)ct,% of S,L,B,I** and **For Repl-Amount or Percent** were added to the **PD Administrator Future Price/Costs Report** to support the processing of foreign replacement costs.

If you use **PD Change Price and Cost Entry**, the product warehouse record is updated immediately. If you use **PD Administrator Price/Costs Update Report**, the product warehouse record is updated after the job is completed. You can create scheduled reports or run the reports manually.

In the **PD Administrator Price/Costs Update Report** or **PD Administrator Future Price/Costs Report**, the foreign replacement costs are updated using the same process that is used for 'replacement costs'. A new 'Foreign Replace Cost' column on each report's output displays the newly calculated cost.

Product

These new features or product improvements were made to the Product module.

Product improvements

These product improvements were made to the Product module.

UOM assignment hierarchy corrected

When selecting the default unit of measure (UOM) to use when adding a Warehouse Manager-managed product to a physical or cycle count during **Product Count Entry**, this hierarchy is used:

- 1 **Product Warehouse Product Setup-Storeroom Count Unit**
- 2 **Product Setup-General Counting** unit
- 3 **Product Setup-General Stocking** unit

If the UOM is not updated during **Product Count Entry**, but is updated at a later time in **Product Setup** or **Product Warehouse Product Setup**, this hierarchy is also applied during **Product Entry Physical Reconciliation Report**. This ensures the proper UOM types are assigned when **Product Entry Count Update Report** is run.

Improved product list lookup now available

The **Product List** field now functions as a lookup on these pages:

- **Product List Setup**
- **Product Setup**
- **Product Warehouse Product Setup**
- **Shopping List** in **Sales Order Entry**

Previously, the **Product List** field functioned as a drop-down list, which would only return a limited number of records. You can now specify search queries using both the product list Description and Type in the **Product List** lookup. You can also clear the **Product List** record limit to view all available records. Additionally, you now have quick access to the **Most Recently Used** product list from the **Product List** lookup.

Use the updated **Product List** lookup field when adding a product to a product list with the **Add to Product List** button in **Product Setup**, **Product Warehouse Product Setup**, and the **Shopping List** function in **Sales Order Entry**. The updated lookup field is used in **Product List Setup** in the Search panel.

Production Scheduling

These new features or product improvements were made to the Production Scheduling module.

New features

These new features were added to the Production Scheduling module.

New Production Scheduling module

This enhancement introduces a new module, Production Scheduling, to the core module set of Distribution SX.e. Product Scheduling can be used to manage your Value Add work order production schedule. It can be used by your production supervisor to monitor and manage fabrication tasks, as well as your customer service representatives to identify the production date of a tied work order during **Sales Order Entry**.

The Production Scheduling module is a stand-alone web application that is docked within the Distribution SX.e menu system for direct access from the application. The Production Scheduling module can be set up to monitor a single work center or production line, or multiple production lines that can be used to control each step in the production process.

When you sell a product that requires fabrication in your production facility, you require visibility into the time required for each step in the production process and the final estimated completion date. This allows you to provide a more accurate shipping date to your customer. The Production Scheduling module is fully integrated with the Value Add module to monitor each step in the work order fabrication process. A production line in Production Scheduling represents either an Internal Process (IS) or Inspection (IN) section on a VA work order. The time required for labor lines in these VA sections are captured and displayed in the Production Scheduling grid.

Your production supervisor must be able to make changes to the production process as needed when resources change or equipment requires down time. Resource and equipment changes may require revising the production date of a particular work center or Value Add process. Your production supervisor can use the Production Scheduling module to view the estimated dates for each VA processing step that updates the VA work order's **Estimated Completion Date**. Any modifications to production dates can be made in **VA Order Entry**.

Production Scheduling relies upon the existing ION Messaging Service API call to process a new ProductionOrder BOD. This Sync BOD is sent to Production Scheduling when a Value Add work order is created or maintained in **VA Order Entry**, or in **Sales Order Entry** to source a VA item tied to a sales order. The BOD contains information about the tied Value Add work order, including the sales order line to which it is tied.

Feature activation

The Production Scheduling module is included with Distribution SX.e as a core module. To activate the module, set up the ProductionOrder BOD in **SA Administrator ION Noun Setup**. You must also enable access to the Production Scheduling module for the appropriate users in **SA Operator Setup-Function Security**.

The ION document flow between CloudSuite Distribution and Production Scheduling must be imported and updated in ION Desk to add the CSD connection point. Otherwise, the application is installed and configured by Infor cloud operations.

See the *Infor CloudSuite Distribution Configuration Guide* for instructions for configuring the Production Scheduling module.

To integrate the Production Scheduling module as a stand-alone module that connects to a third-party back office application other than Distribution SX.e, contact your Infor consulting services representative.

Sales

These new features or product improvements were made to the Sales module.

Product improvements

These product improvements were made to the Sales module.

Cartonization Shipping ID included in advanced shipping notices

The Shipping ID that is assigned to a package that is shipped using **Product Cartonization Center Entry** is now included in the Sync.AdvanceShipNotice BOD. It is located in the UserArea in the AdvanceShipNoticeUnit section of the BOD. You must run the **Sales Entry Advance Shipping Notice (856) Report** to generate Sync.AdvanceShipNotice BODs and send EDI 856 Advance Ship Notices to your customers.

Security improvements for Sales Invoicing Exception Inquiry

Security controls are in place when you select a single order in the **Sales Invoice Exception Inquiry** grid and select **Maintain Single Order**. If the order is in Ordered (Stage 1) or Picked (Stage 2), you must have security in **SA Operator Setup** to change an order in **Sales Order Entry**. This requires **SA Operator Setup-Function Security** Level 3 or higher for **oeet**.

If the order is in Shipped (Stage 4), you must have Level 3 security for **Sales Shipping Feedback Entry** or **oees**. If the order is shipped, you are prevented from maintaining these order types:

- Blanket Order
- Counter Sales
- Quote
- Future Order
- Standing Order
- Return Authorization

For these order types, the message Shipping Feedback Cannot Be Performed on CR, FO, ST, BL, CS, RA, or QU (5737) is displayed.

This change also resolves an error where the **Maintain Single Order** button was not available when you selected a single order in the grid.

System Administrator

These new features or product improvements were made to the System Administrator module.

Product improvements

These product improvements were made to the System Administrator module.

Error now logged if Batch Polling process interrupted

If an error occurs when an advanced batch poller call is run for a particular function, a message is now displayed to the screen and the process is halted. You must correct the error and rerun the process.

Batch polling is used when you select the **Use Advanced Polling Interface Logic for Designated Service Interface Calls** option in **SA Administrator Options-System-General**.

Improved visibility of table load errors in tenant data import logs

To improve the visibility of table load errors, these improvements were made to the **SA Tenant Refresh - Data Import Report**:

- In the `load-thread-x.log` file, the table load errors are displayed after the table load information. Each table is listed separately and now includes up to 30k of the error file. For example:

```
Table Load ERROR: arsc:
>> ERROR READING LINE #59107 (Offset=85482646): ** Input value: test should be yes/no. (87)
>> ERROR! Trailer indicated 59107 records, but 59106 records were loaded.
```

- The table load errors in the `load-thread-x.log` file are included in the `load-broker-out.log` file. The information is displayed after the IFS user information.
- The table load error information is sent to the email recipient that receives the report logs for the import process. The subject line of the email is `Import_Table_Load_ERRORS`. If table load errors did not occur, then the attachment will show 'none'.

Exported data file saved to correct location during tenant refresh

The S3 bucket name that is created when you run the **SA Tenant Refresh - Data Export Report** was updated to remove extra slashes. The slashes caused the `.zip` file to be copied to the wrong location. With this change, the correct file is used during **SA Tenant Refresh - Data Import Report** to import to the source tenant.

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

Product improvements

These product improvements were made to the TWL module.

Inventory discrepancy now displays expected location

The **Expected Bin Location** field is added to the **TWL Execution - Inventory Discrepancy** data grid. When an inventory discrepancy occurs, inventory can sometimes be allocated to a location within a warehouse that it was not intended for. The **Expected Bin Location** is where inventory was initially set to be placed. This update provides important information for warehouse managers when tracking down inventory locations and provides more detailed information for inventory discrepancy records.

Previously, you were only able to view the **Actual Bin Location** of inventory in the data grid, which is where the inventory is located within a warehouse.

Vendor

These new features or product improvements were made to the Vendor module.

New features

These new features were added to the Vendor module.

Accounts Payable Homepage available

A pre-defined homepage for accounts payable clerks, analysts, or managers is now available in Infor Ming.le. Each widget on the homepage is designed to assist users in monitoring accounts, performing tasks, and resolving issues.

The homepage includes these types of widgets:

- **Birst**
Shows a CloudSuite Distribution Analytics dashboard that contain role-based information. The individual widgets in the banner widget represent a Birst report. Click **Explore** to view the report in Birst.
- **ION**
Shows alerts for monitors and workflows that are set up by your system administrator in ION. Users can assign alerts to themselves and then mark them as complete.
- **Distribution SX.e**
Shows data from Distribution SX.e without opening the application.

These widgets are included on the homepage:

- Accounts Payable banner widget comprised of these widgets:
 - AP Invoice Aging Report
 - # of Invoices by Year/Month
 - Top 5 Vendors by AP Balance
- Vendor Lookup
- Vendor Purchase Orders
- Vendor Period Balance
- Vendor Invoice Listing
- Vendor Invoice Discount Date
- New Vendor Alert
- Menu

See the *Infor Distribution SX.e User Guide* for information about each widget.

Note: A new ION API call, `sxapiGetAPVendorInvoices`, is used to retrieve vendor invoice information from Distribution SX.e for the Vendor Invoice Listing widget. The request parameters for API call are similar to the search criteria that is available in **Vendor Inquiry-Transactions**.

Feature activation

The Accounts Payable homepage is available in the Page Catalog on the Homepage view in Infor Ming.le. To add the page to the Homepage view, the SX-AccountsPayable security role must be assigned to a user's Infor Ming.le user record. Users who can sign in to more than one company must configure the lookup widgets to specify the company and user ID from which to retrieve the information.

To display alert and tasks in the ION widgets, the `SXe_Accounts_Payable` group must be included on the distribution list for the related monitors, workflows, or activation policies in ION Desk. To view content in the ION widgets, the `SXe_Accounts_Payable` group must be assigned to the user's Infor Ming.le user record. To view the Birst widgets, the `SXBIRST-User` role must be assigned to the user's Infor Ming.le user record.

See the *Infor CloudSuite Distribution Configuration Guide*.

Product improvements

These product improvements were made to the Vendor module.

2021 updates applied to 1099-MISC and 1099-NEC magnetic media output

As part of Infor's annual review of IRS bulletins related to updates to the 1099 magnetic media file output for 1099-MISC and 1099-NEC forms, these changes were made to the 1099-MISC and 1099-NEC magnetic media output generated by the **Vendor Administrator Federal 1099 Print**:

- Issuer "A" Record
 - Amount Codes:** Increased field position 28-45, length to 18
 - Blank field:** Updated field position to 46-51 (previously 44-51), length changed to 6
- Payee "B" Record
 - Payment Amount H:** New Payment Amount field.
 - Payment Amount J:** New Payment Amount field.

Note: These fields are only loaded on the 1099-DIV form, which is not supported. It is not expected that these fields will be updated by the application. They were added to the Payee B Record to ensure all existing fields positions in the magnetic media output were updated correctly.

- Payee "B" Record

Direct Sale Indicator: This single-digit code is added to the 1099-MISC output.

FATCA Filing Requirement Indicator: This single-digit code is removed from the 1099-MISC and 1099-NEC output.

- Issuer "C" Record

Control Total H: New Control Total field.

Control Total J: New Control Total field.

Note: These fields are only loaded for the 1099-DIV form, which is not supported. It is not expected that these fields will be updated by the application. They were added to the Issuer C Record to ensure all existing fields positions in the magnetic media output were updated correctly.

Performance improved

Changes were made to the logic used during transaction searches to reduce the time required to retrieve records in **Vendor Floor Plan Acceptance Entry**. This improves the performance of the search process, however, we recommend you specify an invoice number or terms value when searching for records.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 2: November 2021 Production Update

This section describes the details of the November 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **November 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

CenPOS integration

These new features or product improvements were made to support the CenPOS integration.

Product improvements: CenPOS

These product improvements were made to support the integration to the CenPOS credit card processor.

Freight charges now processed as a credit card transaction during shipping

When sales orders tendered by credit card are shipped in **Sales Entry Shipping Feedback** or through a third-party shipping application, any additional freight charges are now tendered in full and processed immediately as an additional credit card AUTH transaction if the original order was tendered in full with an AUTH transaction for the shipped amount. This greatly speeds up the process of applying freight charges to an order during shipping, whether you are using standard shipping or are integrated to a third-party shipping application.

Previously, an AUTH transaction was created for freight charges in CenPOS that required processing at end of day as part of a batch process when the **Customer Credit Card Manager Report** was run. This placed the order on hold and delayed tendering and shipping, and invoice processing until the transaction was authorized.

If the credit card AUTH transaction fails, the order is tendered in full in **Sales Entry Shipping Feedback**, but is placed on hold. The warehouse can hold the shipment until your back office personnel are able to access the order in **Sales Credit Release Inquiry** or **Sales Order Entry-Maintain** and resolve the tendering issue. A sales order on hold cannot be shipped in **Sales Entry Shipping Feedback** or a third-party shipping application.

Feature activation

This enhancement streamlines the process of approving additional freight charges during shipping. Nothing is required to activate this enhancement, however, you must now immediately resolve any "over-tendering" issues when freight charge transactions are denied by CenPOS, rather than wait until your end-of-day processing reveals the failed transactions.

Infor Distribution Storeroom CE

These new features or product improvements were made to Infor Distribution Storeroom Cloud Edition.

Product improvements

These product improvements were made to Infor Distribution Storeroom CE.

Flush date option honors nonstock line dates

You can now flush requested shipping and promise dates for stock product lines only. The dates specified on lines for nonstock product lines are retained. Select the new **stock Lines only** option in the **Flush Requested Shipping and Promised Dates** window when you change the Requested Shipping Date or the Promise Date at the header level.

The **Original Lines** option was removed. The **All Lines** and **None** options are still available.

Security roles updated

These Storeroom security roles were updated:

- **Storeroom-CC.CycleCountRpt**
Users with this role can access all functions in the **Cycle Count** menu except for **Count Entry**. Previously, the role also enabled users to submit or delete a run in **Count Entry**.
- **Storeroom-IR.IssAllowNonStockDirects**
Users with this role can submit a direct order for a nonstock product during initial issue entry, order maintenance, or back order maintenance. The order can be a purchase order or a warehouse transfer. Previously, this role was not fully implemented.
- **Storeroom-IR.IssAllowStockSourcing**

Users with this role can source a stock product during initial issue entry, order maintenance, or back order maintenance. Previously, this role was not fully implemented.

Limits applied to nonstock line editing

When you update an existing nonstock line in the **Maintenance** function, only these fields are now available for editing:

- **Requested Amount**
- **Distributor Cost**
- **Promise Date**

With this change, field availability in the **Maintenance** and **Back Order** functions is now consistent. Previously all fields were available for editing.

New integration error notification

When an SXAPI call from Storeroom to Distribution SX.e fails, a server error notification is now displayed for most transactions. It may also be displayed when you sign in or perform a lookup, such as a product lookup. The notification indicates that an unexpected internal server error occurred, and that you should attempt the action again. If the error persists, contact your system administrator.

Infor Rhythm for Commerce integration

These new features or product improvements were made to support the integration to Infor Rhythm.

Product improvements

These product improvements were made to support the integration to Infor Rhythm.

API call updated to return price & discounts for ship to

When the ItemPrices REST API call is made from Infor Rhythm for Commerce to request pricing for a product, if a ship to record is specified either at the order header or line item level, any Price Discounting records in Distribution SX.e for that ship to/product are applied to the product price.

Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

New features

These new features were added to support the integration to Infor Service Management.

Order Invoicing and entry forms available in Distribution SX.e

Order invoicing forms and entry forms related to service orders are now available in Distributions SX.e.

This table shows the order invoicing forms that you can now access from the Service Management module in the Distribution SX.e menu:

Category	Form	Acronym
Inquiry	Order Invoicing Listing	ISMIOIL
Entry	Order Invoicing	ISMEOI
Reports	Order To Be Invoiced Report	ISMROTBI

These entry forms are now available on the **Line/Operations** tab of the **Service Orders** form:

- SRO Material Entry
- SRO Labor Entry
- SRO Miscellaneous Entry

Online help for the forms is maintained in the Service Management documentation library. When you are working in Distribution SX.e, the forms are updated to match Distribution SX.e design standards. Additionally, fields that do not pertain to the integration between Distribution SX.e and Service Management were removed. In Distribution SX.e, use the Smart Help context application to access help content for the forms. Click a link in the Smart Help to open the Service Management documentation library in another tab.

The Distribution SX.e version of the Service Management forms are also available in Service Management. The name of Distribution SX.e versions of the form are annotated with an .sxe suffix, for example, **OrderInvoicing.sxe**.

Feature activation

You must specify the Service Management application URL in **SA Administrator Options-Integrations-Service Management** to enable the forms and data to display in Distribution SX.e. Access to the Service Management module and the individual forms is enabled in **SA Operator Setup-Full Security** for each operator.

Supersede product cross-reference data synchronized

The Sync.ItemMaster BOD was updated to support cross-reference data for supersede records that are set up in **Product Extended Product Cross Reference Setup** in Distribution SX.e. When a supersede record is created or updated, the Sync.ItemMaster BOD is generated to provide the data to Service Management. The supersede product updates the **Supersede Item** field on the **Items** record for the superseded item. The integration only supports one supersede cross-reference per product. When a superseded item is entered for a material transaction on a service order, it is automatically replaced by the supersede item.

Feature activation

The product cross-reference data is not included in the Sync.ItemMaster BOD by default. You must select **Supersede Products** in the Enable Product Cross Reference Publishing in Item Master BOD section in **SA Administrator Options-Integrations-ION Interface Options**.

See [Sync.ItemMaster BOD supports product cross-reference data](#) on page 34.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

New features

These new features affect multiple functions in the application.

Contextual toolbar added to grids

A contextual toolbar is now applied to all grids in Distribution SX.e. The otherwise hidden toolbar is displayed when one or more rows in the grid is selected. The toolbar shows the number of rows that you have selected on one or more pages of the grid. It also includes buttons that you can use to apply actions to the selected rows.

Some of the buttons in the contextual toolbar were previously included in the static toolbar above the grid. These include **Edit**, **Cancel**, **Copy**, **Print**, **Export to Excel**, and **Delete**. Other buttons are actions that were previously available in drop-down menus. For example, **Ship**, **Ship All:Auto Receive WTs**, **Cancel Ship Work**, and **Cartonization** were previously included in the **Actions** drop-down menu in **Transfer Shipping Entry**. Those actions are now available as individual buttons. Similar changes were made in the **Product Administration Exception Center**, **PD Mass Maintenance Entry**, **RS Activity Administration**, and other functions.

Note: Not all action buttons that are dependent on record selection are in the contextual toolbar. Some action buttons, such as the **Merge** button in **Purchase Demand Center Entry**, are located in the window header, or elsewhere, for optimal usability.

The static toolbar is still displayed above the grid. It now typically includes a search field for the grid and the **More ...** menu, which provides access to the export function, filter function, and row height selection. The static toolbar also includes buttons that are not dependent on record selection, such as **New** button.

The buttons on contextual toolbars are available for edit using Personalization. The contextual toolbar was also added to the WYSIWYG designer that is part of the Extension Enablement Toolkit for developers. The contextual toolbar and the static toolbar are included as part of a grid.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

New default style for UI and context applications

The user interface style, called 'New', that was introduced in the September 2021 release is now the default UI style for Distribution SX.e. The new style features a bright and modern color palette, typography that is easier to read, updated icons, and other improvements. You can use it with the light, dark, and high contrast themes.

The new style is now also applied to these Distribution SX.e context applications in Infor Ming.le:

- Activities
- Calculator
- Contact
- Notes
- Report Viewer
- Tiers and Preferences

The 'Classic' style is still available, but it is scheduled for deprecation. To change the user interface style, select **More > Theme** in the Menu bar.

Product improvements

These product improvements affect multiple functions in the application.

Report files older than 120 days now removed weekly

Reports sent to File or transferred to the cloud `/reports/[TenantID]/` directory using **SA File Transfer Administration** that are older than 120 days are now removed automatically by the Rdclean utility once a week. This is to prevent the accumulation of report files that are no longer needed and impacting system performance.

These files and directories are exempt from this removal:

- Programs and rcode (*.p and *.r)
- Files in subdirectories, such as `ProductImport`

Overseas Trade

These new features or product improvements were made to the Overseas Trade module.

Product improvements

These product improvements were made to the Overseas Trade module.

Improved handling of OT transaction changes

As purchase order lines are added or removed from an Advance Ship Notice (ASN) in **OT Transaction Entry**, the POEBT records are removed and new ones are created automatically. A message is displayed to remind you to manually update the ASN in TWL. Similarly, if changes are made to a container or shipment ID that results in the creation of unnecessary ASNs, the POEBT records are now automatically deleted. TWL ASN information is now displayed in **OT Transaction Entry** to warn you when additional ASN records are created. The ASNs must be deleted manually in TWL. Note that during TWL receiving, all ASNs and their related POEBT records are closed automatically.

Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

Product improvements

These product improvements were made to the Pricing and Discounting module.

Rebate price currency added to rebate record import

The rebate price currency value is now supported when you create new records for Vendor on Sale rebates that are based on selling price in **PD Mass Maintenance Entry** using the Import Excel With New Records function.

Use the new set wizard to create an Excel spreadsheet that you can use as a template for new records. Select these values:

- **Product (Type 1)** or **Product Price Type (Type 3)** must be selected in the **Rebate Records** field on the **Create** page.
- **Vendor On Sale** must be selected as the Rebate Code, and the **Rebate by Price** option must be selected on the **Criteria** page.

The values above ensure that these fields are included in the set:

- **Rebate Price**
- **Rebate Price Currency**
- **Use Rebate Price**

If you leave the **Rebate Price Currency** field blank during import, the default currency type from **SA Company Setup** is used. Currency types are set up in **SA Currency Setup**.

Pricing Science for Distribution integration

These new features or product improvements were made to support the integration to Pricing Science for Distribution.

Product improvements

These product improvements were made to support the integration for Pricing Science for Distribution.

Tenant ID added to SA Pricing Science Report output file name

When the **SA Pricing Science Report** is run to export pricing data to the cloud, the output file name now includes your Tenant ID. This file name format is used:

```
DataExtractForPSD-[TenantID]-[CompanyNumber]-[YYYY]-[MM]-[DD]-[HHMMSS].xml.
```

The resulting ZIP file name will also include the Tenant ID.

Product

These new features or product improvements were made to the Product module.

New features

These new features were added to the Product module.

Ship Via product restrictions now supported

You can now identify specific Ship Via requirements for a product and place sales orders on hold when those requirements are not met. Failure to comply with shipping or special handling requirements, such as carrier type or refrigeration, could lead to regulatory fines, or your customers could receive spoiled products. This enhancement can help ensure that your shipment requirements are consistently and reliably met.

Use these new features to restrict products to specific Ship Via parameters:

- **Product Shipping Restriction Setup**
- **Special Handling** tab in **Product Setup**
- **Shipment Type** selection in **SA Table Code Value Setup-Ship Via**

Use the new **Product Shipping Restriction Setup** function to set up Ship Via restrictions by product, product line, or product category. These restriction records can apply to sales orders or warehouse transfers with a specific Ship Via selection.

In addition, you can select special handling restrictions for a product with the new **Special Handling** tab in **Product Setup**. The special handling codes on this tab are set up in the new **Special Handling** table in **SA Table Code Value Setup**. These special handling restrictions can be used to define product characteristics that affect packaging and shipment requirements. For example, you may create a **Special Handling** code that specifies a dry ice packaging requirement.

You can also identify the shipment types allowed for a Ship Via with the new **Shipment Type** field in the **Ship Via** table in **SA Table Code Value Setup**.

Product shipping restriction validation

New validation logic associated with this enhancement is used in **Sales Order Entry**, **Sales Shipping Feedback Entry**, **Transfer Entry**, and **Transfer Shipping Entry**. If a shipment restriction record or special handling record applies to the product, then the shipment-related settings from the sales order or warehouse transfer order are validated against those records. When an invalid shipment is found on a sales order, the order is placed on hold using the hold code specified in **SA Administrator Options-Products-Product Restrictions**. External shipping application integrations do not validate against the product shipment restriction records.

Feature activation

Enable this enhancement in **SA Administrator Options-Products-Product Restrictions**. Select the **Products**, **Product Line**, **Product Category**, and **Special Handling** options to enable the related product shipping restrictions. Specify a value in the **Hold Code** field to be applied to the order when an active shipping restriction is found.

Operator access to the new **Product Shipping Restriction Setup** screen is determined by standard functional security in **SA Operator Setup**.

Sync.ItemMaster BOD supports product cross-reference data

You can now provide product cross-reference data to integrated applications using the outbound Sync.ItemMaster BOD. These types of product cross references, which are set up in **Product Extended Product Cross Reference Setup**, are supported:

- Supersedes
- Substitutions
- Upgrades
- Customer Products
- Vendor Products

Feature activation

The product cross-reference data is not included in the Sync.ItemMaster BOD by default. You must select the types of cross-reference records to include in Sync.ItemMaster BODs in the Enable Product Cross Reference Publishing in Item Master BOD section in **SA Administrator Options-Integrations-ION Interface Options**.

Purchase

These new features or product improvements were added to the Purchase module.

New features

These new features were added to the Purchase module.

New option excludes POs and WTs with long lead times from replenishment calculation

A new option, **Exclude Due Days Greater or Equal**, is added to the Purchase and Transfer replenishment reports. Use this option to exclude any products currently on purchase orders or warehouse transfers with a due date greater than the current date plus the number of days specified when calculating demand. This decreases the on order quantity value for qualifying products which may result in those products qualifying for replenishment.

This option should be used when you are experiencing delays in your supply chain due to manufacturing backlogs or delayed overseas shipping, but you have customer orders that you want to fill sooner than you expect to receive the product on the existing POs or transfers. You may have local sources that can fill your current demand in the short term so you want these products to be included on your replenishment report.

Currently, the **Purchase Entry Recommended Replenishment Action Report** and **Transfer Entry Recommended Replenishment Report** does not include those products because the **Product Warehouse Product Setup** On Order amount is subtracted from Demand when determining if a product qualifies for replenishment. The On Order balance is the quantity that has been placed on order with a vendor or warehouse. With this enhancement, when you specify a number of days in the **Exclude Due Days Greater or Equal** option on the **Purchase Entry Recommended Replenishment Action Report** or **Transfer Entry Recommended Replenishment Report**, any purchase orders or warehouse transfers with a due date greater than or equal to the current date plus number of days specified in this field are not included in the calculation.

This option is now available on these reports:

- **Purchase Entry Recommended Replenishment Action Report** run from the **Purchase > Entry > POE Reports** menu or from **Purchase Demand Center Entry**
- **Transfer Entry Recommended Replenishment Report** run from the **Transfer > Entry > WTE Reports** menu or from **Transfer Demand Center Entry**
- **Purchase Entry RRAR Merge Process Report** run from the **Purchase > Entry > POE Reports** menu or from **Purchase Demand Center Entry**
- **Transfer Entry RRAR Merge Process Report** run from the **Transfer > Entry > WTE Reports** menu or from **Transfer Demand Center Entry**

If the **Auto Merge** option is selected for a product line in **Product Line Setup**, the setting for the **Exclude Due Days Greater or Equal** option as selected for the **Purchase Entry Recommended Replenishment Action Report** is applied during the Merge process. Likewise, if the **Auto Merge** option is selected for the warehouse in **Product Warehouse Description Setup**, the setting for the **Exclude Due Days Greater or Equal** option as selected for the **Transfer Entry Recommended Replenishment Report** is applied during the Merge

process. If a product qualified for the PO or WT RRAR, but was excluded from the Merge because of this option setting, an exception is printed on the **Purchase Entry RRAR Merge Process Report** or **Transfer Entry RRAR Merge Process Report**.

Feature activation

To use this feature, specify a number of days in the **Exclude Due Days Greater or Equal** field for the **Purchase Entry Recommended Replenishment Action Report** or **Transfer Entry Recommended Replenishment Report**. Leave the option blank or zero to run the replenishment reports as previously.

If you use a stored report for your RRAR or Merge process, set a default number of days for this option for an “@” stored report for a specific product line or warehouse.

Product improvements

These product improvements were added to the Purchase module.

Inactive lines filter available in Purchase Order Inquiry

A **Show Inactive Lines** flag is now available in **Purchase Order Inquiry-Edit Lines**. Select or clear this option to display or remove inactive records in the Order Lines grid.

Sales

These new features or product improvements were made to the Sales module.

New features

These new features were added to the Sales module.

Credit hold timestamp honors local time

The credit hold timestamp that is included on the **Sales Order Master List Report** now uses the local time of the user's client system if the **Use Client Time Zone to Load Date/Time on System Records** option in **SA Administrator Options-System** is selected. This change ensures that the timestamps for the credit hold and the credit hold release are captured accurately, using the same time zone.

Product improvements

These product improvements were made to the Sales module.

Serials grid updated

The Serial Entry grid in **Sales Order Entry-Advanced Line Entry-Serials** is updated to include a new **Invoice Date** column and updated **Invoice #** column. These columns are useful when entering a Return Merchandise order in **Sales Order Entry** for a serial product. Now, the **Invoice #** column displays the full invoice number and, if data is available, a hyperlink to **Sales Order Inquiry**.

Automatic creation of tied documents based on return reason

The Copy function in **Sales Order Entry** has been updated to follow the same logic used when a Return Merchandise sales order (OE RM) with a tied purchase order is created manually.

When you copy a Direct Order sales order with a tied purchase order to create an OE RM, a tied Return Merchandise purchase order (PO RM) is created only if the Return Adjust Reason is a vendor return reason or is blank. If the OE RM contains multiple lines when it is created, only one PO RM is created for all lines. When you edit the copied OE RM, this message is displayed: `Manually Adjust PO/WT/WO/VA for Changes Made (5799)`.

System Administrator

These new features or product improvements were made to the System Administrator module.

Product improvements

These product improvements were made to the System Administrator module.

Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake using the **SA Data Extraction for Data Lake and Birst**:

- PV_SECURE
- SASOS
- AUTHSECURE
- contacts-methods
- email-links

SA Data Extraction for Data Lake and Birst report honors date range

The **SA Data Extraction for Data Lake and Birst** report now honors the specified **Date Range** for all supported database tables, with some exceptions. Previously, only certain tables could be selected for extract using the **Date Range** field. Now, if the record does not have an internal **Transdtmz** field, then the **Transdt** or **trans_date** is used.

Specific date fields such as **Invoice Date** or **Entered Date** are still used in the extraction for specific tables where applicable; this function is not changed.

Note: The OEEH and OEEL tables now use the **invoicedt** field in the extraction. Previously, the **enterdt** field was used for these tables.

Certain master data tables are never restricted by a specified **Date Range** when extracted.

See the information in the Distribution SX.e online help and *Infor CloudSuite Distribution Configuration Guide* about the tables in which specific dates apply.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 3: October 2021 Production Update

This section describes the details of the October 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **October 2021** link.

New versioning standard

CloudSuite Distribution has adopted the new Infor standard version number format. The full version number of an update has three segments:

- YYYY. = the year where the release will first deploy to production, followed by a dot
- MM. = the month where the release will first deploy to production, followed by a dot
- NN = the sequence number of the supplementary update to the YYYY.MM version

In preparation for the October update, the version number is 2021.10.00. Depending upon the number of supplementary updates that occur before the October update is deployed, the third segment of this number might change, for example, 2021.10.01.

The versioning standard for documentation will be 2021.x.

This new versioning standard replaces the previous version number format for CloudSuite Distribution, which was 11.21.x.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

General Ledger

These new features or product improvements were made to the General Ledger module.

New features

These new features were added to the General Ledger module.

Proof totals now displayed on GL Entry windows

General Ledger distribution functions that show the amounts posted to GL accounts for these transaction entry functions now display Proof amounts:

- **Customer Transaction Entry**
A Proof total is displayed in the **Add GL Distribution** dialog window showing the amount from the Details window. The **Save & New** button is not appropriate for this dialog window, so was not added.
- **GL Transaction Entry**
Proof totals are now displayed for Debits, Credits, and Balance. The Proofs section is expanded by default and can be minimized.
- **Product Adjust Nonstock/Direct Order Entry**
A Proof total is displayed in the **General Ledger Distribution Details** window displayed when you select **Write Off**. The layout of this window was also changed to improve the placement of fields and options.
- **Vendor Invoice Center Entry**
Proof amounts are now displayed for Amount, Invoice Proofs At Update and At Costing, and PO Costing in a separate Proofs section. Data entry fields are now displayed in a General Ledger section.

Additionally, a **Save & New** button is added to GL Distribution Entry windows. When you click **Save & New**, all data entered is cleared from the window and the fields are ready to enter another record. This is useful when you must enter numerous GL postings across various accounts and would like to avoid having to close and re-enter the GL entry window. If you accessed a GL entry window in Edit mode, clicking **Save & New** saves the entered data and you are placed in Create mode.

Infor Distribution Proof of Delivery CE

These new features or product improvements were made to support the integration to Infor Distribution Proof of Delivery Cloud Edition.

Product improvements

These product improvements were made to support the integration to Infor Distribution Proof of Delivery CE.

Truck ID now displayed in Route grids

The **Truck ID** now displays in the Active Routes grid on the home page and the **Routes** menu of the Driver Application. A **Truck ID** search filter is now available so you can view which routes are assigned to a specific truck.

If you need to update a Truck ID you can do so as long as the Truck ID is in an assigned or open route status. Additionally, if the route that the Truck ID is attached to is already in Retrieved mode, you can not update it.

Previously, you were only able to specify the **Truck ID** when creating a **New Route**, but the truck ID did not display in any data grids.

Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

New features

These new features were added to support the integration to Infor Service Management.

Additional Service Order forms available in Distribution SX.e

This table shows the Service Order-related forms that you can now access from parent forms that are available in Distribution SX.e:

Form	Parent form
Credit Card Payment Information	Service Orders Contracts Rental Counter
Cost/Price Analysis	Service Order Lines
Inspection Sign Off	Service Order Line Inspections
Service Order Line Inspections	Service Order Lines
SRO Price/ Billing Details	Service Orders

Online help for the forms is maintained in the Service Management documentation library. When you are working in Distribution SX.e, the forms are updated to match Distribution SX.e design standards. Additionally, fields that do not pertain to the integration between Distribution SX.e and Service Management are removed. In Distribution SX.e, use the Smart Help context application to access help content for the forms. Click a link in the Smart Help to open the Service Management documentation library in another tab.

The Distribution SX.e version of the Service Management forms are also available in Service Management. The name of Distribution SX.e versions of the form are annotated with an .sxe suffix, for example, **ServiceOrderLines.sxe**.

Feature activation

You must specify the Service Management application URL in **SA Administrator Options-Integrations-Service Management** to enable the forms and data to display in Distribution SX.e. Operator access to the Service Management module and the individual forms is determined by standard functional security in **SA Operator Setup**. Operator access to forms that are accessed from a parent form is based on the security for the parent form.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

New features

These new features affect multiple functions in the application.

Expandable card format implemented in user interface

The expandable sections that group related fields and controls in Distribution SX.e functions were updated to a card format. Where appropriate, the card format was also added to functional areas that were previously presented in a static display. You can collapse or expand each card using the caret icon in the left corner.

Implementation of the card format improves layout and usability. It also enables additional customization of the UI. Most cards are presented in the expanded state, but you can select the default state through Personalization. In a few functions, such as **SA Event Manager Activate Entry**, business logic determines when a card is expanded or collapsed. You cannot personalize those cards.

Expandable cards are included in the WYSIWYG designer in the Extension Enablement Kit. The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

Note: The user-defined fields that you set up in **SA Administrator Options-System** are displayed in the User Fields card in the appropriate function. This includes Inquiry, Setup, Entry, and Administration functions where the User Fields card is displayed on the **Custom** tab or another screen. We recommend that any other fields resulting from custom modifications are included in a different card.

Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

Product improvements

These product improvements were made to the Pricing and Discounting module.

Batch call process enabled for additional PD Mass Maintenance Entry calls

Batch call processing is now enabled for these additional Service Interface calls in **PD Mass Maintenance Entry**:

- **PDEM Update Set Data Column Override (Type 1, 5, 7) - pdemgridupdatepdsc1**
- **PDEM Update Set Data Column Override (Type 2) - pdemgridupdatepdsc2**
- **PDEM Update Set Data Column Override (Type 3, 4, 6, 8) - pdemgridupdatepdsc3**
- **PDEM Update Set Data Column Override (Rebates) - pdemgridupdatepdsr**

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select these Service Interface call from the **Available Advanced Polling Calls** list.

When activated, the calls are used in the set level **Column Actions > Column Override** and **Column Calculator** functions when you import and update price and discount records in **PD Mass Maintenance Entry**.

Product

These new features or product improvements were made to the Product module.

Product improvements

These product improvements were made to the Product module.

Option allows updating Unavailable Inventory balances during count

A new option, **WM Unavail Bins as Unavail Count**, is added to **Product Entry Physical Count Report** and **Product Entry Cycle Count Report**. When you set this option to **Yes**, any quantities counted in bins designated in **WM Bin Location and Product Setup** with an **Assignment** of **Unavailable** are identified as "U" type adjustments and update unavailable inventory during **Product Entry Cycle Count Update**.

If the option is **No**, it works as previously, where the quantities in Unavailable bins update On Hand balances.

Purchase

These new features or product improvements were added to the Purchase module.

New features

These new features were added to the Purchase module.

Purchasing Homepage available

A pre-defined homepage for CloudSuite Distribution users that interface with vendors is now available in Infor Ming.le. Each widget on the homepage is designed to assist users in performing tasks, resolving issues, and improving vendor satisfaction.

The homepage includes these types of widgets:

- **Birst**
Shows a CloudSuite Distribution Analytics dashboard that contain role-based information. The individual widgets in the banner widget represent a Birst report. Click **Explore** to view the report in Birst.
- **ION**
Shows alerts for monitors and workflows that are set up by your system administrator in ION. Users can assign alerts to themselves and then mark them as complete.
- **Distribution SX.e**
- Shows data from Distribution SX.e without opening the application.

These widgets are included on the homepage:

- Purchasing banner widget comprised of these widgets:
 - Top 5 Vendors by Order Fill Rate
 - Purchase Order Amount Current vs LY (last year)
 - # of POs by Stage Code
- Vendor Lookup
- Vendor Purchase Orders
- Vendor Period Balance
- Purchase Order Listing
- PO Approval
- Non Stock Item
- Purchase Order Overdue
- Inventory Stock Out
- Broken Tie Alert
- PO Deviation Alert
- PO Acknowledgement
- Menu

See the *Infor Distribution SX.e User Guide* for information about each widget.

Feature activation

The Purchasing homepage is available in the Page Catalog on the Homepage view in Infor Ming.le. To add the page to the Homepage view, the SX-Purchasing security role must be assigned to a user's Infor Ming.le user record. Users that can sign in to more than one company must configure the lookup widgets to specify the company and user ID from which to retrieve the information.

To display alert and tasks in the ION widgets, the SXe_Purchase group must be included on the distribution list for the related monitors, workflows, or activation policies in ION Desk. To view content in the ION widgets, the SXe_Purchase group must be assigned to the user's Infor Ming.le user record. To view the report in Birst, the SXBIRST-Consumer-Administrator role must be assigned to the user's Infor Ming.le user record.

See the *Infor CloudSuite Distribution Configuration Guide*.

Product improvements

These product improvements were added to the Purchase module.

Receiving options display last PO suffix

When receiving a purchase order in **Purchase Receipt of Inventory Entry** using Quick Receive, you can now click **Last PO Suffix** after specifying the PO to receive. This displays the highest PO suffix that is in a stage less than Received. If all suffixes are received, the highest suffix is displayed.

You can also select **Always Find Last Open PO Suffix of Selected Purchase Order** to always show the highest suffix for the selected purchase order. The checkbox selection is honored as long as you are in **Purchase Receipt of Inventory Entry**. This saves you the effort of selecting **Last PO Suffix** each time you access the **Quick Receive** window.

Sales

These new features or product improvements were made to the Sales module.

Product improvements

These product improvements were made to the Sales module.

Import from Excel format includes line comments print flags

Four columns are added to the **Sales Order Entry-Import From Excel** function to indicate the documents on which line comments on an imported order are printed. This augments an earlier enhancement that supported printing line comments on Delivery and TWL Packing documents. Now, when you import sales orders with line comments, you can also indicate all documents on which those comments should be printed.

These new columns are added:

- **Print Invoice**
- **Print Ack**
- **Print TWL Pack**

- **Print Delivery**

A value of **yes** in any column overrides the **Print Option** selection for the order and replaces it with the new selections.

Note: The columns may be in any order, but each heading must be spelled exactly as noted.

Line comments in an Excel import file are now formatted in the Line Information section as:

Excel Column	A	B	O
Heading	Product	Description	Print Option
Row 11-999 Values	COMMENT	This is the comment text.	Yes

Excel Column	P	Q	R	S
Heading	Print Invoice	Print Ack	Print TWL Pack	Print Delivery
Row 11-999 Values	Yes	Yes	Yes	Yes

If the values in the Print columns (noted above as columns P-S) are all **no**, the **Print Option** selection is applied. And, if **Print Option** is **yes**, line comments are printed on the Invoice and Acknowledgment documents only. A value of **y** or **yes** is treated as **YES**, and any other value in these columns is treated as **no**.

Note: The columns can be added anywhere after Column B. The position of the new columns is not important. The import process extracts the data in a column based on its heading text.

Feature activation

Update all of your Excel files used to import sales orders in **Sales Order Entry-Import From Excel** to add the new columns to enable printing line comments on additional documents..

Net available calculation updated for fulfillment orders

The Net Available calculation for line items on fulfillment orders was updated to adjust for these values:

- The quantity that is reserved for the customer in **Product Customer Reservation/Forecast Setup**.
- The unit specified for the line item.

These functional areas were affected by the update:

- **Sales Order Entry**
 - Advanced Line Entry - Line Details section
If a reserved quantity is included in the Net Available amount, 'CR' is displayed after the Net Available label.
Note: The update to this Net Available amount was for customer reserved quantities only.
 - Quick Line Entry - Products to Add grid
 - Easy Line Entry - Products grid
The In Stock amount represents the Net Available amount.
 - Edit Lines - Line Items grid

- **Sales Order Inquiry-Line Detail** - Order Lines grid

If the Net Available column is hidden, you can personalize the grid to make the column available.

First Geocode loaded on order created from external application

When an order is created in Distribution SX.e from an external source using the SalesOrder BOD or sxapiOEFULLOrderMntV6 SX.API call, and you are using either Sovos' Global Tax Determination or Vertex Cloud to calculate sales taxes, the ship to address is used to determine the Geo Code. If more than one Geo Code is returned by Sovos or Vertex, the first one is loaded on the sales order as part of the ship to address. An exception message is now displayed in Electronic Transaction Control Center (ETCC) to prompt you to review the ship to address on the order and confirm the Geo Code is correct.

Previously, the exception message was displayed in all cases, even when a single Geo Code was found.

Note: Maintain the sales order in **Sales Order Entry** and perform a look up on the **Geo Code** field. Review the Geo Codes that are returned for the address and select the correct code.

System Administrator

These new features or product improvements were made to the System Administrator module.

Product improvements

These product improvements were made to the System Administrator module.

Rebuild report updated to process only index tables

The **SA Word Index Rebuild Report**, which populates the word index database with data from the main transaction database, now processes only these tables:

apss_index	icsc_index	pdsc_index
apsv_index	icsd_index	poeh_index
arsc_index	icses_index	poel_index
arsg_index	icsp_index	sled_index
arss_index	icsw_index	vaeh_index
contacts_index	item_index	wteh_index
glsa_index	oeeh_index	wtel_index

These tables, which were previously word index-based tables, are no longer processed by the report:

apet	iceti	pdsra
aret	icsec	sabs
contacts-roles	icsei	sasgt
crsb	icseu	sasta
edsv	icsl	smsn
gletv	kpet	vaes
icenh	oeel	whmst

Additionally, **GUI** is no longer a valid value for the **Table: (All) or Single Table Name** option on the report. You can specify **All**, **Web**, or the name of a table.

GL postings corrected for expensed vs trade invoices with Vertex

If your company is based in Canada, your GST and PST tax liabilities are now posted to the GL account specified in the **AP Tax - Expense** field in **SA Company Setup-Taxes** for expensed invoices.

GST/PST tax liabilities for non-expensed invoices processed in **Vendor Invoice Center Entry** are now posted to the GL accounts specified in the **ITC Account** and **PST Account** fields in the GST/PST Settings section in **SA Company Setup-Taxes** window, respectively.

API setup changes now recorded in log file

Any changes in **SA Application Integration Endpoint Setup** to create, maintain, or delete records are now recorded in a log file. The `sasapi.YYYMMDD.log` file is stored in the `/reports/[TenantID]/logs` directory. The log entry displays the current record, or deleted record. The secret key values are masked for security reasons.

Note: Changes to **SA Application Integration Endpoint Setup** records by other methods, such as during tenant provisioning, are not logged.

Vendor

These new features or product improvements were made to the Vendor module.

Product improvements

These product improvements were made to the Vendor module.

GL entry controlled for reversal of vendor invoice

When you reverse a vendor invoice in **Vendor Invoice Center Entry**, the ability to add or delete GL entries in the General Ledger Distribution view is now controlled. If the GL is updated automatically after you save the Reversal transaction, the **New** and **Delete** buttons are not available and you cannot maintain the GL entries. The reversal inactivates the invoice and AP transactions.

If you receive the message `No Automatic G/L Reversal Available, G/L Distribution Screen Will Appear (8045)`, the **New** and **Delete** buttons are available so that you can specify the proper GL accounts to be updated for the reversal. Your GL entries must balance and the Proof amount must be zero.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Upgrade path

To upgrade to Infor Distribution SX.e 11.x, you must be on a version of 4.0 or later. Older releases should be upgraded to 4.0 before upgrading to 11.x.

Progress OpenEdge version requirement

Progress OpenEdge version 11.7.2.011 is the minimum requirement for Distribution SX.e version 11.19.1 and later.

If you upgrade your on-premises installation, you must install it on the Windows client machines, and then re-install the clients to use the new version of OpenEdge. After upgrading the database to a new version of OpenEdge, all shared memory connections require the new version.

Contact Infor Support if you have questions regarding installation or upgrade issues.

See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 4: September 2021 Production Update

This section describes the details of the September 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **September 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

Credit Card Interface

These new features or product improvements were made to support the Credit Card Interface integration.

New features

These new features were added to support the integration to the Credit Card Interface.

Gift cards supported with CenPOS integration

Gift card processing is now supported with the Distribution SX.e integration to the CenPOS credit card processor.

The industry defines gift cards, or “stored-value cards”, as one of two types: open loop and closed loop. Open loop gift cards are cards that can be used to purchase goods from any merchant who accepts credit cards. Examples include prepaid Visa or MasterCard gift cards. Closed loop gift cards are purchased, directly or indirectly, from the merchant and used at their business for their goods only. For example, Home Depot, Starbucks, Dicks Sporting Goods, etc. This enhancement supports the use of closed loop gift cards to pay for goods purchased on sales orders processed in Distribution SX.e.

All communication with the gift card processor is handled in CenPOS. This include card activation, balance verification, and balance re-load actions initiated in Distribution SX.e. Currently, CenPOS has certified their integration with First Data Financial Services to process their gift cards.

Updated processes

These Distribution SX.e functions are updated to process gift cards, either to issue a gift card to a customer, or accept one as payment:

- **Sales Order Entry**

Use **Sales Order Entry** to issue, activate, apply payment with, reload, or inquire on the balance of a gift card.

Issue a gift card in **Sales Order Entry** and tender the order in full. If consumer is present to accept the gift card, activation also occurs.

Redeem a gift card as payment in **Sales Order Entry-Receive On Account** or **Collect Payment** using the gift card payment type.

Reload a gift card in **Sales Order Entry-Receive On Account**.

Setups

These setups are required to implement gift card processing:

- **GL Account Setup**

A gift card liability account must be set up that is updated when gift cards are purchased and redeemed. This liability offsets entries to the Cash account. The liability account is assigned to a Payment Type record in **SA Table Code Value Setup**.

- **SA Table Code Value Setup-Payment Type**

You define your gift card payment type and assign the gift card GL liability account code in **SA Table Code Value Setup** in the Payment Type table. Select the new **Gift Card** field and, optionally, select the **Allow Reload of Gift Card** option.

- **Product Warehouse Description Payment Types Setup**

A new option is added to identify a warehouse-specific payment type associated with a gift card as one that can be reloaded. If selected, this overrides the **Allow Reload of Gift Card** option in **SA Table Code Value Setup-Payment Type**.

- **SA Administrator Options-Documents-Sales Orders-Approval Process**

Optionally, enable a return merchandise amount to be applied to a gift card with the new option, **Allow Return to Create Gift Card**.

Feature activation

To activate the gift card feature, select **Gift Card Processing** in **SA Administrator Options-Documents-Sales Orders-Approval Process**. You must also set up a GL Liability account in **GL Setup Account** to be used for gift card sales and redemptions. Then, set up a gift card payment type in **SA Table Code Value Setup-Payment Type** and assign the gift card GL liability account. Complete the same setups in **Product Warehouse Description Payment Types Setup** if you have also established payment types at the warehouse or store location.

Optionally, select whether to allow reload of gift cards at the company level in **SA Table Code Value Setup-Payment Type** or warehouse level in **Product Warehouse Description Payment Types Setup**. Additionally, specify whether to allow returns to create gift cards in **SA Administrator Options-Documents-Sales Orders-Approval Process**.

See the *Infor CloudSuite Distribution Integration Guide for CenPOS*.

Infor Distribution Storeroom CE

These new features or product improvements were made to Infor Distribution Storeroom Cloud Edition.

New features

These new features were added to Infor Distribution Storeroom CE.

New processing options available for sales orders and Bill on Receipt products

New options are now available to accommodate sales order processing for customer Storeroom warehouses that are maintained within your own facility and Bill on Receipt (BOR) processing.

- Prevent the automatic shipment of sales orders
You can clear the new **Auto Ship Storeroom Issues** option in **Product Warehouse Description Setup-Storeroom** to create sales orders in Order (1) stage. You can then maintain, pick, and ship the order on the new **Maintenance** screen in Storeroom. You can also print pick tickets using standard Distribution SX.e functionality, including Infor Document Management.
- New sourcing options for stock and nonstock products
You can now source stock products on purchase orders (PO) and warehouse transfers (WT), including direct POs and WTs. You can also source nonstocks on direct POs and WTs. New security roles determine if you can source stock products and submit a direct order for a nonstock product.
Sourcing for these products are prohibited: customer-owned, regrind, receive as unavailable, and BOR.
- Classification of Bill on Receipt (BOR) orders and lines
These new flags are used in the database to identify sales orders and sales order lines with BOR products:
 - `srautoborfl`: Indicates that the sales order was automatically created to bill customers for BOR products that were acquired through a purchase order or warehouse transfer. The flag is used in the OEEH table.
 - `srborfl`: Indicates that the BOR product on the line was issues to the customer from Storeroom. The flag is used in the OEEL table.The flag data can be extracted to Data Lake and used for reporting in Birst. The flags are not visible in Distribution SX.e but are included in **Sales Order Master List Report** output.
- Price BOR products at cost
Instead of maintaining pricing records for BOR products, you can set the selling price for BOR products to the cost at which the product was received on purchase orders and warehouse transfers. Select the

new **Bill on Receipt Priced at Line Cost** option in **Product Warehouse Description Setup-Storeroom**. Use this option if you charge your customers a monthly fee, or some other method, to manage their inventory. It will prevent standard pricing logic from occurring.

- Track BOR product selling price for reporting
You can now use the existing **Calculate and Save System Price** option in **SA Administrator Options-Documents-Sales Orders-Entry Settings** to calculate the selling price for a BOR product on a sales order line. The selling price, which is based on the Distribution Sx.e pricing hierarchy, and other related pricing data are saved to the OEEL database table. The data can be extracted to the Data Lake and used for reporting in Birst to compare the selling price to the price that you originally billed the customer.

See the *Infor CloudSuite Distribution Integration Guide for Infor Distribution Storeroom CE*.

Infor Rate Shopping - TM integration

These new features or product improvements were made to support the integration to Infor Rate Shopping - TM.

New features

These new features were added to support the integration of Infor Rate Shopping - TM.

Integration to Infor Rate Shopping - TM

The integration to the new Infor Rate Shopping - TM application is now supported for CloudSuite Distribution. Infor Rate Shopping - TM is accessed from the **Sales Order Entry-Freight Rate Shopping** window to request real-time shipping rates from your contracted carriers for LTL and parcel shipping.

The integration uses ION API and the CodeDefinition master data BOD to exchange data between CloudSuite Distribution and Infor Rate Shopping - TM. The calculated freight charges in Rate Shopping automatically flow back to the order or quote in CloudSuite Distribution to ensure the customer is billed what was quoted.

Infor Rate Shopping - TM provides these features:

- Returns shipping rates from multiple carriers, including UPS, FedEx, DHL, LTL rate table, USPS, and Canadian carriers
- Provides freight costs for LTL (less-than-load) and parcel shipments
- Returns rates based on ship date or current date

After the freight rates from Infor Rate Shopping - TM are returned to the **Sales Order Entry-Freight Rate Shopping** window, you can use the Freight Rate Shopping function to perform these tasks:

- Create up to five parcels for a single order
- Compare and select the best carrier rate for each order
- Update the Ship Via based on your carrier selection

- See the estimated delivery date and time
- Add freight and handling charges to your order shipment

Feature activation

After you purchase Infor Rate Shopping - TM, activate the integration by selecting the **Use TM Freight Rate Shopping** option in **SA Administrator Options-Integrations-TMS Integration Options**.

You must also set up tables in Distribution SX.e that establish transportation values that are used by Infor Rate Shopping - TM. These include the Ship Via and Transportation Equipment Type tables in **SA Table Code Value Setup**. Predefined values, such as the **Transportation Freight Class** and **Transportation Packaging Type**, are assigned to your products in **Product Setup**.

You must also configure the ION integration in ION API and ION Desk, and then complete the initial master data load of Ship Via records using the CodeDefinition BOD.

See the *Infor CloudSuite Distribution Integration Guide for Infor Rate Shopping - TM* for implementation instructions.

Contact your Infor sales representative for information about Infor Rate Shopping - TM.

Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

New features

These new features were added to support the integration to Infor Service Management.

Service Order forms available in Distribution SX.e

Additional Service Management forms are available in Distribution SX.e. This table shows the new service order-related forms that you can now access from the Service Management module in the Distribution SX.e menu:

Category	Form	Acronym
Entry	Service Order Lines	ISMESROL
	Service Order Operations	ISMESROO
	Service Order Transactions	ISMESROT
Utilities	Service Order Close Utility	ISMUCSRO

Online help for the forms is maintained in the Service Management documentation library. When you are working in Distribution SX.e, the forms are updated to match Distribution SX.e design standards. Additionally,

fields that do not pertain to the integration between Distribution SX.e and Service Management are removed. In Distribution SX.e, use the Smart Help context application to access help content for the forms. Click a link in the Smart Help to open the Service Management documentation library in another tab.

The Distribution SX.e version of the Service Management forms are also available in Service Management. The name of Distribution SX.e versions of the form are annotated with an .sxe suffix, for example, **ServiceOrderLines.sxe**.

Feature activation

You must specify the Service Management application URL in **SA Administrator Options-Integrations-Service Management** to enable the forms and data to display in Distribution SX.e. Operator access to the Service Management module and the individual forms is determined by standard functional security in **SA Operator Setup**.

Product improvements

These product improvements were made to support the integration to Infor Service Management.

Sales orders released from hold during invoicing

If a sales order is placed on hold when a Process.Invoice BOD is received from Service Management, it is now automatically released from hold. This change applies to credit checks and other types of holds. It ensures that the order can ship and prevents billing and posting issues.

New Invoice Exception Center supported

The new **Invoice Exception Center** in Service Management provides an administrator-level view of integration data, such as order and invoice statuses. Use the **Invoice Exception Center** to review and remediate integration issues.

A new SX.API call, `sxapioegetordersbyservicekey`, was created to support the **Invoice Exception Center**. It is used to retrieve sales order information from Distribution SX.e, based on a list of service order and invoice numbers requested in Service Management.

In the **Invoice Exception Center**, you can directly access several Distribution SX.e functions to view information related to the selected invoice. This list shows the search criteria values from Service Management that are used for each function:

- **Electronic Transaction Control Center**
 - **Process Type:** SXAPI
 - **Transaction Type:** All
 - **Transaction Status:** Error
 - **Update Status:** All
 - **From Date:** From date on the Invoice Exception Center form
 - **To Date:** To date on the Invoice Exception Center form

- **SA ION Inbox/Outbox Inquiry**
 - **Direction:** Inbound
 - **ION Noun:** Invoice
- **Sales Credit Release Inquiry**
 - **Customer:** Customer on invoice
 - **Warehouse:** Warehouse on invoice
 - **Begin Date:** From date on the Invoice Exception Center form
 - **End Date:** To date on the Invoice Exception Center form
- **Sales Order Inquiry**
 - **Keyword:** Order number

See the *Infor CloudSuite Distribution Integration Guide to Infor Service Management*.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

New features

These new features affect multiple functions in the application.

Redesigned Advanced Search improves usability

Advanced Search was updated to improve usability and visually enhance the application. These changes were made:

- Advanced Search is now presented in a pop-up window accessed by selecting **Advanced Search** in the **Search** view
- The **Search**, **Save Search**, and **Reset** buttons are displayed in the toolbar. The **Criteria** field, **Saved Searches** field, and **Delete Search** button are displayed under the toolbar, but are separated from the selected criteria fields. This expands the previous **Save & Search** option into two separate actions.
- The field sizes of the criteria fields are standardized. In most functions, all criteria fields are displayed by default. Exceptions include functions, such as **Sales Order Inquiry**, in which the criteria fields are too numerous to display by default. The criteria fields are grouped in field sets that contain related fields. Examples of field sets include General and Address field sets for customer and vendor setup and inquiry functions.
- The criteria field values for your most recent search are retained as long as the function remains open. If you close the function and then reopen it, the default advanced search is displayed. The default search can be the system default or a saved search that you designated as the default search.
- Hyperlinks that were previously included with Advanced Search fields were removed.

The improvements affect all functions in which Advanced Search was previously available. Additional changes were also made to specific functions. Advanced Search was added to **RS Activity Administration**, **SA Extension Administration**, and **WL Transaction Inquiry**. In **PD Pricing Setup**, you can now save searches per record

type such as customer price, rebates, vendor, contract, and National Program. If you saved searches in **PD Pricing Setup**, re-create them with the new Advanced Search.

Personalizing and extending

Depending on your operator security, you can personalize and extend the Advanced Search window and its sub-views, including adding hot keys for keyboard shortcuts. Select **Personalize** or **Extend** from the **More ...** menu to display the views that you can edit for the window. To determine if a view was previously personalized or extended, select **More ... > View Info**.

For information about personalization, see the *Infor Distribution SX.e User Guide*.

If you use the Extension Enablement Toolkit to create a new Inquiry function, Advanced Search is included by default. You can also now select the **Advanced Search Criteria** as a template when you create a new view. If you previously created inquiry, setup, or reconcile functions that includes Advanced Search, re-factor these to include the updated Advanced Search.

Additionally, the Hyperlink subtype was added to the existing button control in the WYSIWYG Designer in support of this enhancement.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

If you are a member of the CSD/SX.e - Extensibility Customer & Partner Community at <http://community.infor.com>, see the Advanced Search Modal videos (VID054 and VID055).

New user interface style

You can now apply an alternate style to your Distribution SX.e application user interface. The new style features a bright and modern color palette, typography that is easier to read, updated icons, and other improvements. You can use it with the light, dark, and high contrast themes.

The Classic style is the default style for the UI. To apply the new style, select **More > Theme** in the Menu bar, and then select **New** in the Style section.

Product improvements

These product improvements affect multiple functions in the application.

Service Interface calls limited by buffer size threshold

Service Interface calls that query the database buffer in excess of 500,000 times, are now placed in a lock status for 30 minutes. This prevents bad queries from negatively impacting the cloud server and database.

Logs are now updated to record when a service call is locked. The log entry includes the IFS user name and email address of the operator that initiated the call. Example: 2021/06/22@13:26:21.1541 [ERROR] P-30580

U-291 D-JSMITH H-USCSNJSMITH01 SetupLog4sx serviceinterface/proxy/retrieve.p - Invalid Request Error, Cono: 1000, Operator: jss, Email: john.smith@company.com, IFS: 4ed2aa9928cd2d39edfec9570171f5d6, Error: The call for this operator, table, and whereclause was locked out for 30 minutes. Lock expires in:2m25s, httpResponseCode: 400.

A business rule can be activated to adjust the number of queries that are permitted before the call is locked to a value from 100,000 or higher. The default is **500,000**. Select the DBBuffLimit Rule Type in **SA Business Rule Setup** to set a **Rule Value** of **100,000** or higher.

Note: If you specify a **Rule Value** lower than **100,000**, it is adjusted to **100,000**.

Journal open and close dates & times based on current date & time

When General Ledger journals are opened and closed, the current date and times the journal is open and closed are now recorded in the **SA Journal Setup Assigned Date/Time** and **Closed Date/Time** fields.

Previously, the open date and time were recorded in both the **Assigned Date/Time** and **Closed Date/Time** fields, regardless if the journal took several minutes to run.

Note: This correction applies whether you adjust for Daylight Saving Time or are using the client's date and time zone. It is applied to all functions that open or close a journal.

Additional application data added to the About page

The Stack Name and Host Name are now included on the **About** page that is available from the **More... > Advanced** menu in the Distribution SX.e toolbar. The version and build data for Distribution SX.e and Report Scheduler is also displayed, as in previous versions. To expedite issue resolution, provide this information when you report an incident. You can attach a screen shot of the application data to the incident.

Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

New features

These new features were added to the Pricing and Discounting module.

Expanded margin limits and hold options

Currently, minimum and maximum margin limits are assigned only at the company level for product price types in **SA Table Code Value Setup-Product Price Types**. This enhancement uses a hierarchy of new margin tolerances for an order line's product price type records to apply updated margin hold logic at invoice processing or shipping. This expansion of the line level margin checks and hold functionality associated with

product price types provides more flexibility when applying margin holds to sales orders. With this change, you can now enforce minimum and maximum margin percentages based on new factors such as customer, warehouse, pricing zone, and price region.

New margin limit options

Use the new **PD Margin Tolerance Setup** to specify line-level margin tolerances based on customer, warehouse, pricing zone, and price region, in addition to the company-level limits set up in **SA Table Code Value Setup** by product price type. You can specify minimum and maximum percentage values for each type of margin limit.

When this enhancement is enabled, the specified tolerance limits are verified at order entry, shipping, and invoice processing. This hierarchy is used when checking the limits:

- 1 Customer
- 2 Warehouse
- 3 Pricing Zone
- 4 Price Region
- 5 Company

When the first active minimum and maximum limit is found, the search is ended and all other levels in the hierarchy are ignored.

The warehouse, pricing zone, and price region margin types can be affected by the operator's home warehouse settings in **SA Operator Setup** and **Product Warehouse Description Setup**.

Order entry margin checks

When you enable extended margin limits, a warning message is displayed to the user for each **Sales Order Entry** line item where the margin is outside the allowable tolerance, according to the margin checks hierarchy. The **Sales Exceptions Report** now includes the hierarchy of margin limits for customer, warehouse, pricing zone, price region, and **SA Table Code Value Setup-Product Price Type** company level when they are set up. To display lines with the margin exception on the report, the **Item Profit Margin Beyond Defined Limits** report option must be set to **Yes**.

Invoicing margin holds

When you enable invoicing margin limit holds, orders are placed on margin hold during invoice processing when a line is outside the margin tolerance limits defined in **PD Margin Tolerance Setup** and **SA Table Code Value Setup**. If an order line or lines cause an order exception in the **Sales Entry Invoice Processing Report** based on the margin checks hierarchy, then the order is placed on hold, and the exception is displayed in the **Sales Invoicing Exception Inquiry**.

You can release the invoicing margin hold in **Sales Credit Release Inquiry** or on the **Operational Hold Code Approval** page in **Sales Shipping Feedback Entry**.

Feature activation

Select the **Use Extended Margin Limits** option in **SA Administrator Options-Documents-Sales Orders-Approval Process** to enable the extended margin limits specified in **PD Margin Tolerance Setup**.

Select the **Use Invoicing Margin Limit Holds** option in **SA Administrator Options-Documents-Sales Orders-Approval Process** to put orders on hold in invoice processing when they are outside the margin limits defined in **PD Margin Tolerance Setup**. This option cannot be selected if the **Use Extended Margin Limits** option is deselected. Additionally, you must implement operational hold codes to allow multiple active holds per order. The line level margin limit checks consider all operational hold codes when determining an order's approval.

See the information in the Distribution SX.e online help for implementing operational hold codes.

Specify a value in the new **Invoicing Margin Hold** field in **SA Administrator Options-Documents-Sales Orders-Approval Process**. This value is added to the default set of operational hold codes in **SA Table Code Value Setup**.

Operator access to the new **PD Margin Tolerance Setup** screen is determined by standard functional security in **SA Operator Setup**.

Optionally, create pricing zones that are specific to your business requirements in the new **Pricing Zone** table in **SA Table Code Value Setup**. This table provides lookup values for the **Pricing Zone** fields in **PD Margin Tolerance Setup** and **Product Warehouse Description Setup**.

Sales

These new features or product improvements were made to the Sales module.

New features

These new features were added to the Sales module.

Support for manufacturer rep processing

As a distributor, you may direct customers to the manufacturer to purchase certain items. In this role, you serve as the manufacturer's salesrep, and are eligible to earn commission on those products that your customer purchases directly from the manufacturer. This agreement may apply to a specific product or product line, or to sales that occur within an established territory. The manufacturer fills the order and ships the product directly to your customer. Because there is no movement of inventory from within your warehouse, there is no cost of goods sold, orders do not impact your General Ledger, and there is no tax liability.

It is necessary, however, to track the orders that you create as a manufacturer's rep to ensure that you monitor the manufacturer's service levels and the commission you earn on those orders. This enhancement adds features that help you track manufacturer rep orders and commissions earned. A new function, **Sales Manufacturer Commission Setup**, is added to store the commission rates for all manufacturer vendors or a specific vendor that can be associated with one or multiple warehouses, products, product lines, product categories, customers, or sales territories. You can record a single commission earned for your company and also pay your inside or outside salesreps a portion of that commission.

A new Manufacturer Rep order type is used to record the order and commission amount in **Sales Order Entry**. This is a type of Direct Order transaction used to record a sale that is filled and shipped by the vendor. The order is automatically placed on hold until you receive your commission payment from the manufacturer. You can release the hold in **Sales Credit Release Inquiry** or **Sales Shipping Feedback Entry** when the commission payment is received. Manufacturer Rep orders can be one of two types: either a Manufacturer Sales Order (MS), or a Total Sales Manufacturer Rep (TS) order. The TS order is used to record an order when you receive a commission report or payment from the manufacturer with no order detail and no order already exists in Distribution SX.e. TS orders are recorded against a “dummy” inventory record associated with the warehouse. Each Manufacturer Rep order must contain at least one line item to track and calculate inside/outside sales rep commissions as well as set an amount on the order. A **Total Sale Item** is set up on the **Product Warehouse Description Setup** record to automatically default when selecting to use a Total Sales manufacturer order.

To enable entry of the Manufacturer Rep order, you create a customer record in **Customer Setup** for the manufacturer vendor. This is much like a floorplan customer where you’re reimbursed on behalf of your true customer by a third party. New fields in **Customer Setup** are used to identify the customer as a manufacturer vendor and link it to an existing **Vendor Setup** record, assign salesreps, indicate if invoice printing is required, and to specify how commission is calculated. The “floorplan” manufacturer customer is selected in **Sales Order Entry** when you identify the order as a Manufacturer Rep order. The manufacturer customer is used in invoice processing to create the invoice for payment of the commission to the distributor from the vendor. During **Sales Entry Invoice Processing Report**, your general ledger is updated with the total commission earned.

For each manufacturer, you can elect to pay a portion of the commission to your inside and outside salesreps. Salesrep commission can be calculated on each Manufacturer Rep order line based on a percentage of the earned commission or the sales amount of the line item. You can also define a specific inside and outside salesrep for each manufacturer customer. The inside and outside salesrep commission rates are applied according to the existing **Sales Commission Setup** rates based on salesrep and commission type. You can run **SM Commission Report** to determine what commission is owed to your inside and outside salesreps.

When the commission payment is recorded in **Customer Cash Receipt Entry**, your GL is updated to properly record the commission received.

Feature activation

To use this feature, you must select the **Use Manufacturer Sales Rep Orders** option in **SA Administrator Options-Documents-Sales Order-Entry Settings**. Also, define a hold code for Manufacturer Rep orders that are automatically placed on hold.

Your manufacturer vendors must be set up in **Customer Setup** as **Manufacturer Vendor** records.

You must specify a **Manufacturer Total Sales Item** in **Product Warehouse Description Setup-Extended** for use on Total Sales Manufacturer Rep orders.

Ensure commission rates are set up for your manufacturer vendors in **Sales Manufacturer Commission Setup**. Enable access to this new function for the appropriate users in **SA Operator Setup**.

If you are using operational hold codes, define a hold code in **SA Table Code Value Setup-Operational Hold Code** for Manufacturer Rep orders that are automatically placed on hold.

Populate shopping lists from Infor CPQ configurator

You can now use the Shopping List function to create individual sales order line items using product configuration information from Infor CPQ. Distributors often use Infor CPQ to specify the options that are needed in order to meet certain specifications and build a complete product. Currently, the resulting bill of materials (BOM) can be used to create a build-on-demand (BOD) kit that contains components. Now, you can add the resulting BOM as individual items in a **Shopping List** in **Sales Order Entry**. After populating the Shopping List, you can add the items as individual sales order line items, instead of as a kit. This is helpful when you must adjust, add, delete, or backorder individual items.

Launch Infor CPQ by selecting the **Configurator** Shopping List grid option. Then, when the configuration details are completed in Infor CPQ, the Shopping List is updated with the new data records. After it is populated, the Shopping List is no longer tied to Infor CPQ and cannot be reconfigured like BOD kits.

Note: A specific product can only exist in the Shopping List once. Items returned from Infor CPQ that already exist in the Shopping List are skipped. We recommend writing the Infor CPQ manufacturing rules so that a specific product is returned once in the item list with the total quantity needed.

Feature activation

The initial integration to Infor CPQ does not change and requires setup in **SA Administrator Options-Integrations-Configurator Options** to establish a link between CloudSuite Distribution and Infor CPQ. In addition, ensure that each shopping list rule set written in the Infor CPQ Design Studio is added as a record in the Configurator Rule Sets table in **SA Table Code Value Setup**.

Customer Service homepage available

A pre-defined homepage for CloudSuite Distribution customer service representatives (CSRs) is now available in Infor Ming.le. Each widget on the homepage is designed to assist CSRs in performing tasks, resolving issues, and improving customer satisfaction.

The homepage includes these types of widgets:

- **Birst:** Shows Birst Visualizer reports that were created in CloudSuite Distribution Analytics. CSRs can click **Explore** to view a report in Birst. The reports are also displayed as a dashboard in CloudSuite Distribution Analytics.
- **ION:** Shows alerts that are set up by your system administrator in ION. CSRs can assign alerts to themselves and then indicate that they are done.
- **Distribution SX.e:** Shows data from Distribution SX.e without opening the application.

These widgets are included on the homepage:

- Customer Service banner widget is that is comprised of these widgets:
 - No Sales Last 30 Days
 - Fill Rate - Top 5 Customers by Sales
 - # of Orders by Stage Code
- Customer Lookup
- Warehouse Lookup
- Product Lookup
- Invoice Listing
- Customer Open Orders
- Customer Period Balance
- Convert Quotes
- Shipment Delays
- Quote Expiration
- Short Shipments
- Shipment Overdue
- Menu

See the *Infor Distribution SX.e User Guide* for information about the details about each widget.

Feature activation

The Customer Service homepage is available in the Page Catalog on the Homepage view in Infor Ming.le. To add the Customer Service page to their Homepage view and view the contents, the SX-CustomerService, SXBIRST-User, and SX-Birst-OrderEntry security roles must be assigned to a CSR's Infor Ming.le user record. When a user can sign in to more than one company, the CSR must configure the lookup widgets to specify the company and user ID for which to retrieve the information.

To display alerts in the ION widgets, the SXe_CustomerService group must be included on the distribution list for the related monitors, workflows, or activation policies in ION Desk. To view content in the ION widgets, the SXe_CustomerService or the SXe_Sales group must be assigned to the CSR's Infor Ming.le user record.

See the *Infor CloudSuite Distribution Configuration Guide*.

Product improvements

These product improvements were made to the Sales module.

Batch call process enabled for Sales Order Entry multi-line sourcing

Batch call processing is now enabled for the **Multi-Line Sourcing** function in **Sales Order Entry-Edit Lines**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select the **oEET Multi-Line Sourcing - oemultilinesourcingupdate** service interface call from the **Available Advanced Polling Calls** list.

This is useful if you are performing multi-line sourcing for a large number of order lines.

With this service interface call selected, when you select multiple lines in **Sales Order Entry-Edit Lines**, and then select **Sourcing**, a batch process is initiated when you click **Submit** from the **Multi-Line Sourcing** window that runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the sourcing process to complete without timeout errors.

Discount date added to report

The discount date is now printed on the **Sales Consolidated Invoice Report** when the consolidated invoice qualifies for a discount. The discount date is extracted from the terms associated with the AR transaction records assigned to a consolidated order. For example, **Cash Discount 8.50 If Paid By 07/31/21**.

Note: The Terms discount fields are not included in the Infor Document Management Format 4 forms template for Consolidated Invoices. You must add them manually.

System Administrator

These new features or product improvements were made to the System Administrator module.

Product improvements

These product improvements were made to the System Administrator module.

Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake using **SA Data Extraction for Data Lake and Birst**:

- activities
- arsp
- oeelextra
- pdsm
- smsc
- smseh
- smsep
- smsew
- smsp
- smss
- smsv
- smsvp
- smsvw
- smsw

Copy feature supported for extension records

You can now copy existing records in **SA Extension Administration**. Use this feature to create a new unique Extension ID or to copy a record to a different destination, company or system, without changing the active status of the source record.

The **Copy** button is available on the main page when you select a record in the grid and on the **Extension** page when you open an existing record. Source and Destination values are displayed on the **Copy** page, but only these Destination values are available for edit: Extension ID, Level, Function Name, Tags, Description, and Active Flag. You cannot change the Revision or Type values on the new copied record.

SA Extension Administration is a component of the Extension Enablement Toolkit. The toolkit is part of the standard product, and can be used to customize the user interface and logic. An advanced understanding of CSS and JavaScript is required to fully utilize the toolkit and ensure that the functionality of the application is not adversely affected. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

Product improvements

These product improvements were made to the TWL module.

Conversion program purges WLIT transactions

A conversion program is now run when the Distribution SX.e application is updated to purge all inactive transactions in **WL Transaction Inquiry** that are 180 days and older. Message transactions 90 days and older are removed. This is to prevent the database from filling up with processed records and impacting system performance.

No action is required to implement the conversion program. The conversion program is initiated by the Infor Cloud Operations team when a new version of Distribution SX.e is applied to production cloud tenants.

Note: To remove inactive and message transactions sooner than 180 and 90 days, you can run **WL Delete Transmissions Report**. You can also select **Purge WLIT when they become Inactive** in **SA Administrator Options-Logistics-WL Options** to immediately delete inactive transactions from **WL Transaction Inquiry**.

Vendor

These new features or product improvements were made to the Vendor module.

Product improvements

These product improvements were made to the Vendor module.

Batch call process enabled for Vendor Invoice Center Entry-Final Update

Batch call processing is now enabled for the Final Update process in **Vendor Invoice Center Entry**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select the **APECE Final Update - apeiinvdetfinalupdt** service interface call from the **Available Advanced Polling Calls** list.

This is useful if you are performing Final Update for a large number of invoices, especially invoices that are Trade types and represent POs with many line items.

With this service interface call selected, when you select **Final Update**, a batch process is initiated that runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the update process to complete without timeout errors.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 5: August 2021 Production Update

This section describes the details of the August 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **August 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

Customer

These new features or product improvements were made to the Customer module.

Product improvements

These product improvements were made to the Customer module.

Fatal errors in Cash Receipt Entry no longer stop processing

When a fatal type error is encountered when you finish transaction entry in **Customer Cash Receipt Entry**, processing is no longer interrupted. Instead, error transactions are now created that can be viewed and resolved in **Sales Invoicing Exception Inquiry**. In addition, this exception is displayed after updates are made in **Customer Cash Receipt Entry**: Update Completed. An Error Was Encountered. Check OEIX For Details.

General Ledger is also updated with postings to suspense accounts, if necessary.

When you access **Sales Invoicing Exception Inquiry** to view errors for **Customer Cash Receipt Entry**, you can now limit the records that display to AR-type errors. A new field, **Exception Type**, is added to the Search panel. When you select **Accounts Receivable**, the columns in the grid are relabeled to display AR detail. You

can review the errors to determine how to correct them, either to provide missing data, or reverse GL suspense account postings.

Note: Fatal errors might occur for an inactive or missing invoice, inactive or missing credit, or missing customer record, etc. These errors must be resolved and payments or credits reapplied in **Customer Cash Receipt Entry**.

EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

Product improvements

These product improvements were made to support EDI documents.

Rebate remittance exceptions report now provided

When an EDI 849 Response to Product Transfer Account Adjustment document is received in the ProcessSXVendorRebateClaim BOD, an **EDI Rebate Remittance Exceptions Report** is now sent to the email address on the stored **EDI Entry Processing Rebates Report** that is used to process the BOD. Use the report to reconcile the vendor rebate credits provided in the BOD against the rebate amounts claimed.

The email address is specified in the Printing Information section on the **Information** page on the **EDI Entry Processing Rebates Report**.

See the *Infor CloudSuite Distribution Setup and Administration Guide for EDI*.

Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

New features

These new features were added to support the integration to Infor Service Management.

Service Order forms available in Distribution SX.e

To provide a more efficient workflow that eliminates toggling between applications, you can now access the Service Order form and other related forms in Distribution SX.e.

This table shows the forms that you can access from the Service Management module in the Distribution SX.e menu:

Category	Form	Acronym
Inquiry	Signatures	ISMIS
Setup	Incidents	ISMSI
	Service Orders	ISMSSRO
Entry	Incident Quick Create	ISMEIQC
	SRO Quick Create	ISMESRQC
Reports	Service Order Work Order Report	ISMRSWOR

Online help for the forms is maintained in the Service Management documentation library. When you are working in Distribution SX.e, the forms are updated to match Distribution SX.e design standards. Additionally, fields that do not pertain to the integration between Distribution SX.e and Service Management are removed. In Distribution SX.e, use the Smart Help context application to access help content for the forms. Click a link in the Smart Help to open the Service Management documentation library in another tab.

The Distribution SX.e version of the Service Management forms are also available in Service Management. The name of Distribution SX.e versions of the form are annotated with an .sxe suffix, for example, **Signatures.sxe**.

Feature activation

You must specify the Service Management application URL in **SA Administrator Options-Integrations-Service Management** to enable the forms and data to display in Distribution SX.e. Operator access to the Service Management module and the individual forms is determined by standard functional security in **SA Operator Setup**.

ION integration

These new features or product improvements were made to support the integration to ION.

Product improvements

These product improvements were made to support the integration to ION.

Ship to and bill to phone numbers added to SXFileTransport BOD

The Ship To Phone Number in **Customer Ship To Setup** and Bill To Phone Number from **Customer Setup** are now included in the SXFileTransport BOD. The SXFileTransport BOD is transmitted to ION when you select to print Format 4 forms, such as an invoice or pick ticket, to **Third Party** or **IDM Output Management and Third Party**.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

Product improvements

These product improvements affect multiple functions in the application.

Dropbox changes support Refresh Token handling

Changes are made to the integration to Dropbox to support an updated process for obtaining access tokens to the Dropbox server and to the method for sending files to Dropbox.

Effective September 30, 2021, Dropbox will no longer return access tokens that are long-lived, or do not expire. This requires changes to the Distribution SX.e application to return Refresh Tokens when uploading documents that are printed to Dropbox.

The changes impact new Dropbox configurations only. If you are currently using Dropbox and have installed and configured the application, Dropbox will continue to accept your existing tokens.

See the information in the Distribution SX.e online help for enabling report output to Dropbox.

Feature activation

If your company or users have not installed and configured Dropbox as an integrated file-hosting service, you will use these functions to configure the integration:

- **SA Administrator Options-System-General**
Select the **Interface to Dropbox** option in order to send reports to Dropbox.
- **SA Operator Setup-Controls**
Each operator must generate a new App Key, Secret Key, and Code for Dropbox. These values are now stored in the database. The system administrator uses those values to receive a new access token that is uploaded to Dropbox.
- **Dropbox**
The Dropbox Developers web site is used to configure the application to return Refresh Tokens when documents are uploaded from Distribution SX.e. A temporary code is saved on the **SA Operator Setup**

account and is used to obtain a Refresh Token that is tied to the user's Dropbox login to enable access to their personal Dropbox area.

Performance improved for selection of large data sets in grids

Changes were made to improve the time required to select a large number of data sets in grids in Distribution SX.e. These changes improve the time required for all records to be selected when you click **Select All** for any grid.

Product

These new features or product improvements were made to the Product module.

Product improvements

These product improvements were made to the Product module.

Product names with asterisk display in warehouse product search

Product names that end in an asterisk (*) are now displayed in the grid after you conduct a search using the **Product** lookup field in **Product Warehouse Product Setup**. Previously, a product ending with an asterisk did not display in the grid because the asterisk was omitted from the search.

To facilitate this change, the asterisk is now processed as a special character in the word index. To implement this change, you must run **SA Word Index Rebuild Report** for these tables:

- ICSP
- ICSW
- ICSES
- PDSC
- SLED

Batch call process enabled for Exception Center search

Batch call processing is now enabled for searching and loading data in **Product Administration Exception Center**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select the **ICAMU Search - icamubuildmainlist** service interface call from the **Available Advanced Polling Calls** list.

With this service interface call selected, when you conduct a search for a **Record Type** of **Automated** in **Product Administration Exception Center** and select a large number of records to display, a batch process is initiated

that runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the search process to complete without timeout errors.

Performance improved for Month End Processing

Changes were made to improved the processing time required when you run **Product Administration Month End Processing Report** and select **yes** for the **Recalculate ICSL Product Line Usage** option.

Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

Product improvements

These product improvements were made to the Pricing and Discounting module.

Pricing API calls updated to include future prices

If you use these API calls to receive requests for and return pricing data to integrated applications, you can now include future prices set up for products in **PD Future Price/Cost Change Setup**:

- `sxapi0EPricing`
- `sxapi0EPricingMultiple`

The API calls were updated to allow passing a `futuredate=mm/dd/yy` value in the Extra Data List input parameter.

These business rules can be enabled in **SA Business Rule Setup** to use the future date to return future price data:

- **AllowFuturePrice**
Select **yes** for the **Rule Value** to allow API requests for a future price. If this business rule is not enabled, future prices are not calculated and returned in the API call, regardless if a future date is provided in the request.
- **AllowFuturePriceCost**
Select **yes** for the **Rule Value** to return an API request for a future price or cost from **PD Future Price/Cost Change Setup**.
- **AllowFuturePriceCostSeq**
Select **yes** for the **Rule Value** to use **PD Future Price/Cost Change Setup** records to calculate prices or costs in date sequence. If there is both a global and warehouse-specific future price record with the same effective date, the warehouse-specific record is used.

Future prices are set up for products in **PD Future Price/Cost Change Setup** and assigned an **Effective Date**. If a future date is passed in either of the API calls, it is verified against records in **PD Future Price/Cost Change**

Setup with an Effective Date on or before the future date to determine the future cost. The process for determining the future price is similar to the logic applied when you run **PD Administrator Future Price/Cost Report** to update prices and costs on **Product Warehouse Product Setup** records.

Future price requests cannot be made for these records:

- Rebate prices
- Nonstock products
- Catalog products
- Build-on-demand kits
- Tally product
- Value Add product

Purchase

These new features or product improvements were added to the Purchase module.

Product improvements

These product improvements were added to the Purchase module.

Inactive lines filter available in Purchase Order Entry

A **Show Inactive Lines** flag is now available in **Purchase Order Entry-Edit Lines**. Select or clear this option to show or remove inactive records in the Lines grid.

Sales

These new features or product improvements were made to the Sales module.

Product improvements

These product improvements were made to the Sales module.

Sales order invoice verification enabled

You can now flag a sales order to require operator review before an invoice is created and sent to a customer. This function is useful when a fully shipped order should be held for invoicing because of incomplete information that could affect invoicing accuracy and customer acceptance. This enhancement does not

change how orders are picked (Stage 2) or shipped (Stage 3), only how they are invoiced (Stage 4). When this enhancement is enabled, the new **Require Invoice Verification** field can be set on these pages:

- **Sales Order Entry-Initiate**
- **Sales Order Entry-Maintain**
- **Sales Shipping Feedback Entry-Shipping Details-Header**

When this enhancement is enabled, invoice processing is prevented for any sales order where the new **Require Invoice Verification** field is set to **Yes**. A **Yes** value indicates that an operator must review the invoice and change the field to **No** before the sales order can be invoiced.

The **Require Invoice Verification** field can be changed to **Yes** by an operator during **Sales Order Entry** or **Sales Shipping Feedback Entry** only. Care should be taken when selecting **Yes**, as a delayed invoice results in delayed payment to you.

Note: The **Require Invoice Verification** setting cannot be updated by any external BODs or API programs that create or modify sales orders.

For each sales order requiring invoice verification that is encountered in the **Sales Entry Invoice Processing Report**, an exception is created and reported on the **Sales Exception Report**. You can also see the exceptions on the **Sales Pre-Invoice Exceptions Report** and in **Sales Invoicing Exception Inquiry**.

The **Sales Order Register Report** is updated to include a new option to report only orders where the **Require Invoice Verification** field is set to **Yes**.

The **Require Invoice Verification** value is also visible for these functions:

- **Sales Order Inquiry**
- **Sales Order Master List Report**

In these functions where a new order or order suffix is created, the **Require Invoice Verification** field is populated based on its value in the originating order:

- **Sales Order Entry-Sales Order Fulfillment**
- **Sales Order Entry-Copy**
- **Sales Blanket Release Entry**
- **Sales Entry Processing Cancel/Convert Orders Report**
- **Sales Shipping Feedback Split to Backorder Entry**

You can change the invoice verification value by maintaining the new order in **Sales Order Entry**.

Demand printing for invoices is unchanged. You can print an invoice on demand that is set for invoice verification from the **Sales Demand Invoice Report**, and from **Sales Order Entry**, **Sales Shipping Feedback Entry**, and **Sales Credit Release Inquiry**.

Feature activation

Select the new **Use Invoice Verification** option in **SA Administrator Options-Documents-Sales Orders-Processing**. The field is deselected by default.

Optionally, you can use **SA Mass Maintenance Administration** to update the new **Require Invoice Verification** field value on many sales order header records at one time. Sales orders with a stage of 3 or lower only can be updated in **SA Mass Maintenance Administration**.

Sales order header fields added to Sales Credit Release Inquiry

These fields from **Sales Order Entry** order header records are now displayed in the **Sales Credit Release Inquiry** grid:

- **Customer PO**
- **Ship Date**
- **Ship To**

These fields can provide important information to credit managers when determining which orders should be released from credit hold. This is useful when multiple orders for the same customer purchase order (PO), ship date, or ship to should be released together.

Feature activation

Use Personalization to add the **Customer PO**, **Ship Date**, and **Ship To** columns to the grid in **Sales Credit Release Inquiry**.

System Administrator

These new features or product improvements were made to the System Administrator module.

Product improvements

These product improvements were made to the System Administrator module.

Data extraction report name updated

The **SA Administrator Birst Extraction Report** is now named **SA Data Extraction for Data Lake and Birst**. This name change helps to clarify that the report is not exclusively used by Birst.

Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake using **SA Data Extraction for Data Lake and Birst**:

- aodata
- arsde
- gletv
- icsdp
- oeeha
- sasb
- sastc

- oteh
- oteph
- otepl
- otevh
- otevl

Conversion program to purge all BODs after 60 days

A conversion program is now run when CloudSuite Distribution is updated to purge all inbound and outbound BOD records in the ION inbox/outbox, regardless of status, that are older than 60 days. The program will also purge successfully processed BODs that are older than 7 days. The conversion program is initiated by the Infor Cloud Operations team when updated versions of Distribution SX.e are applied to production cloud tenants.

This is to prevent the inbox/outbox from filling up with BOD records and impacting system performance. Pending or processed BODs not yet purged can be viewed in **SA ION Inbox/Outbox Inquiry**.

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

New features

These new features were added to the TWL module.

TWL RF upgraded to HTML5

The TWL RF device user interface is now upgraded to use HTML5 web markup language.

The HTML5 upgrade provides for controlled data updates while keeping application functionality consistent for existing users. Some user interface changes are made to enable the program to run in a web environment. Using HTML5 standards provides for a more modern looking user interface. Previously, the TWL RF module was presented as a character-based user interface (CHUI).

Several features are now added with the HTML5 upgrade to enhance user workflow including:

- Upgraded login security
- Improved label printing functionality
- Reorganized questions and prompts before data update
- Reduced prompts by presenting tables to the user in work order creation
- Icons added for notes in picking and receiving
- Occasional event sequence change
- Rush and Alternate warehouse notifications are now informational

- Use of shortcuts in a web environment with new menu options instead of shortcut keys

Approximately 130 TWL RF functions have been upgraded.

A new **TWL Execution-RF Admin Maintenance** function allows your warehouse manager to review data issues and release locked data records resulting from exiting a TWL RF function improperly. This may occur when an RF user closes a window rather than selecting a **Cancel** option on the RF device, locking the record and leaving data inaccessible to all users. These data issues are logged when the user does not exit a TWL RF window properly:

- **Active Receipt Lines**

When a user selects a line to receive in the RF, its status is changed to active to notify other users that the line is no longer available. If the user leaves the **Receipt** window by closing the web browser, it is left in an active stage and other users are unable to access the line. Use the **Active Receipt Lines** search option to select the lines and then click **Reopen Lines** to release them.

- **In Pick Picks**

When a user selects a line to pick in the RF, its status is changed to in-pick to notify other users that the pick is no longer available. If the user leaves the **Picking** window by closing the web browser, the pick is left in an in-pick stage, preventing other users from accessing the record. Use the **In Pick Picks** option to release these picks.

- **Active Putaway**

During the beginning of a putaway operation, a record is created to link to the original receipt. If the user leaves the **Putaway** window by closing the web browser, the putaway is left active, not allowing other users to access the putaway. Use the **Active Putaway** option to release these putaway records.

- **Active Replenishments**

During a 1-step replenishment or the first step of a 2-step replenishment, the movement record is marked active after the user starts working on it. If the user exits the **Replenishment** window by closing the web browser, the movement record is left active. Use the **Active Replenishments** option to release these movement records.

- **Close Receipts**

The **Close Receipts** search option provides a broad overview of open receipts needing to be closed. Closing receipts in this function must only be done by the warehouse administrator. Select a receipt in the grid and click **Close**.

Note: We recommend only working with the current day's open records if you are certain the line in question is available and a user has reported they incorrectly closed the browser and cannot access the record again. Select **Include Today** to view the latest active lines.

A new set of hotkeys has now been implemented as part of the HTML5 upgrade to allow the user to expedite the time it takes to perform certain tasks. Some of these new hotkeys include:

Hotkey	Function
Alt+L	Set label printer
Alt+A	Add a note
F4 or X or RF browser back button	Back

Note: The **X** key can be used to navigate back in menu functions and in grids. Additionally, the user can only press **F4** and the back button in the RF browser to navigate back from menus with editable cells.

Feature activation

Important: The TWL RF HTML5 enhancement is released with limited availability. The features supporting the HTML5 user interface are being delivered in two phases. The first phase is released in the August 2021 update, or 21.8, and supports the majority of tasks performed using TWL RF devices. In addition, deployment of TWL RF devices requires manual deployment to the cloud. Contact your Infor consulting services representative to request assistance. We will notify you when the second phase of planned features are released and the feature is out of limited availability.

RF device users must now sign in with a Distribution SX.e login instead of using their **TWL RF Employee** login. The **TWL RF Employee** record is still created, but the **TWL RF Employee ID** must be assigned to the user's **SA Operator Setup** record to support single sign-on access to TWL RF.

To enable access to **TWL Execution-RF Admin Maintenance**, you must apply the appropriate security permissions to the user's **SA Operator Setup** record. We recommend you limit access to this new function to only warehouse administrators.

We recommend you review your RF devices to verify they are HTML5-compatible. See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

TWL documentation is updated to reflect any changes to procedures where an RF device is utilized.

Receiving Overseas Trade containers supported in TWL

Total Warehouse Logistics (TWL) is enhanced to now include Overseas Trade (OT) tracking documents when receiving products in a TWL warehouse. Tracking documents are created in **OT Transaction Entry** to assign purchase orders for an overseas vendor to a container or vessel. When the container is received in your TWL warehouse using an OT tracking number in **Purchase Receipt of Inventory Entry** or processed in **EDI Entry Processing Ship Notice Report**, TWL is updated via an Advance Ship Notice (ASN) record.

To support ASN receiving in TWL, **OT Transaction Entry** transactions that are created manually in **OT Transaction Entry** or received in the EDI 856i Advance Ship Notice are updated to include **Purchase Batch Receiving Entry** records (POEBT which include POEBH and POELB records). These POEBT records are temporary database records that are sent in a **WL Transaction Inquiry** receipt update as standard ASNs are. When receiving is completed against the ASN document in TWL, either automatically or manually, the **WL Transaction Inquiry** record updates the purchase orders and the temporary POEBT records are deleted.

WL Entry Batch Receiving Report is also updated to allocate any OT addons across all purchase orders in an OT transaction. This mimics the same allocation method used when receiving POs assigned to an OT tracking document in **Purchase Receipt of Inventory Entry** for a standard warehouse. OT addons are still entered in **OT Transaction Entry**.

To support search and analysis of Overseas Trade transactions in Birst, these Overseas Trade tables are added to the export process for the Data Lake:

- OTEH: **OT Transaction Entry** header
- OTEPH: **OT Transaction Entry** PO header
- OTEPL: **OT Transaction Entry** PO lines

- OTEVH: **OT Vessel Entry** header
- OTEVL: **OT Vessel Entry** lines

To activate these tables for Data Lake export, select the **Replicate to Data Lake** option for each table in **SA Administrator Options-System-Options**. The tables are exported to the Data Lake when you run the **SA Data Extraction for Data Lake and Birst Report**.

Feature activation

No activation is required to support receipt of Overseas Trade containers in TWL. The POEBT records in the ASNs are created automatically when you receive against an OT tracking number in **Purchase Receipt of Inventory Entry** or process the EDI 856i ASN containing an OT tracking number.

The existing options for controlling ASN receipts in TWL are honored by this new process. We recommend you review these options in **Vendor Setup-Ordering** and **TWL Administrator-System Parameters** and determine how they should be set for your company:

- If the **Create TWL ASN** option is selected for each overseas vendor in **Vendor Setup-Ordering**, ASNs are sent to TWL immediately upon receipt in **Purchase Receipt of Inventory Entry**. If this option is not selected, you can hold the ASNs for review using the Load ASN function on the RF. Then use Shipment ASN to receive the ASN.
- To enable automatic receipt of ASNs in TWL, select **yes** for the TWL system parameter **6264-Auto Receive ASN**. Then, select **WL Auto Receive ASN** for each overseas vendor in **Vendor Setup-Ordering**. If you have not implemented auto receiving of ASNs in TWL, you must manually receive each ASN.
- Select the **Block POs** option in **Vendor Setup-Ordering** to block individual purchase orders that are associated with an ASN from being sent to TWL in a receipt transaction (RT) when the PO is printed in Distribution SX.e. Instead, all POs for the vendor are contained in the ASN and the receiving is done against this ASN.

Product improvements

These product improvements were made to the TWL module.

Order line status added to TWL Order Inquiry-Lines

The order line status is now added to the **TWL Order Inquiry-Line** grid. A new column, **Line Status**, displays the status, such as **Picked** or **Shipped**, of the order line.

TWL Order Drop displays errors for failed order drops

TWL Order Drop now displays inventory allocation errors in the **Orders Attempted** tab of the **Drop Summary** screen if any issues are encountered during the order drop process. Previously, these errors only displayed in the GUI (Graphical User Interface) version of TWL.

In addition to this update, the error messages now provide the reason for the failed order drop instead of only displaying the rule used for the order drop. Providing the reasons for any issues caused during the order drop process helps warehouse managers resolve the errors.

TWL EOD process outputs to new log file

The TWL EOD process executed by the Report Scheduler now outputs to a new TWL log file named `twleod.log`. This new log file better isolates the results of the TWL EOD execution.

Previously, the TWL EOD process would output to the standard `rpctrun` output log file instead of a TWL log file.

Vendor

These new features or product improvements were made to the Vendor module.

Product improvements

These product improvements were made to the Vendor module.

New AO option checks invoice tolerances before receiving

A new option, **Check Invoice Tolerances Before Receiving**, is added to **SA Administrator Options-Vendors-Receiving**. When this is selected, the AP Total Costed amount for a DO purchase order automatically received when it is costed against a vendor invoice in **Vendor Invoice Center Entry** must also be within the invoice total tolerance allowance.

In some situations, a DO PO may be automatically received because the PO quantity, PO amount, and PO Header values are all within the tolerances defined in the Auto-Receive of Direct Orders section in **SA Administrator Options-Vendors-Receiving**. However, the vendor invoice might show a proof balance that prevents it from being costed. This creates a reconciliation error and requires manual review.

If the **Check Invoice Tolerances Before Receiving** option is selected, the total costed amount is checked to ensure it is within the tolerances defined at the company level in the Tolerances for Batch Reconcile section in **SA Administrator Options-Vendors-Receiving** or by vendor in **Vendor Setup-Reconcile**. If it is not, the DO PO is not received and the AP invoice is not costed.

Feature activation

Select the **Check Invoice Tolerances Before Receiving** to prevent the receipt of DO POs when the corresponding invoice is out of tolerance with invoice reconciliation tolerance settings.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 6: July 2021 Production Update

This section describes the details of the July 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **July 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

Bulk Delivery

These new features or product improvements were made to the Bulk Delivery module.

Product improvements

These product improvements were added to the Bulk Delivery module.

MRU lookup added

The Most Recently Used (MRU) feature is added to lookups in the Bulk Delivery module. Use the MRU lookup feature to view the last five records that you accessed for a given entity or document.

Delivery Due Date range added to replenishment report

The starting and ending **Delivery Due Date** range is added to the **BD Entry Recommended Tank Replenishment Report**. Use this date range to specify a starting and ending date by which deliveries are due and create tank replenishment recommendations for that date range. The **Delivery Due** date is stored in **BD Tank Master Setup** and is updated when you run **BD Administrator Tank Calculations Report**.

EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

Product improvements

These product improvements were made to support EDI documents.

Additional update status values detail EDI 820 processing

Update status values that represent stages of the WIP update status are now available for EDI 820 Payment Order/Remittance Advice transactions in **Electronic Transaction Control Center (ETCC)**. This table shows the new or updated update status values that can display:

Update Status	Description
Ready to Process	This status is displayed if one of these conditions are met: <ul style="list-style-type: none"> All errors and exceptions for the transaction have been reviewed and corrected. The transaction is ready to process. The transaction was imported without error and is ready to process, but the transaction is not scheduled for an update. The stored Customer Entry Lockbox Import Report that was used to process the EDI 820 document is not set to post or update imported transactions.
Schedule Update	This status is displayed temporarily before the update is scheduled.
WIP	The transaction was imported and is being processed as a new record in the system. This temporary status is displayed before another WIP-related update status is applied.
Update Scheduled	The transaction is scheduled for an update, but the Customer Entry Lockbox Update Report has not yet run.
Update Started	The update is in process.
Update Failed	An error occurred during processing, and the transaction was not updated.

See the *Infor CloudSuite Distribution Setup and Administration Guide for EDI*.

Infor Distribution Proof of Delivery CE

These new features or product improvements were made to support the integration to Infor Distribution Proof of Delivery Cloud Edition.

Product improvements

These product improvements were made to support the integration to Infor Distribution Proof of Delivery CE.

Accounting entity added to Managers application

The **Accounting Entity** is now displayed on all delivery detail grids in the Managers application. This enables you to distinguish the company associated with a delivery transaction.

These grids are updated to include the Accounting Entity:

- **Unscheduled Deliveries**
- **Deliveries**
- **Delivery Detail-Add Delivery**

Use the filter option in the grid header for this field to limit the deliveries by company/accounting entity.

Infor Document Management integration

These new features or product improvements were made to support the integration to Infor Document Management.

New features

These new features were added to support the integration to Infor Document Management (IDM).

Barcode label printing supported with IDM

You can now print barcode labels for Integrated Barcode, cartonization, and Total Warehouse Logistics (TWL) using Infor Document Management (IDM). When label printing is initiated in Distribution SX.e, the values that are required for the labels are sent to IDM in XML format through the Document Output API call. The labels, which are based on templates that are saved in IDM, are then output to printers that are identified as IDM label printers in Distribution SX.e.

Each label type has a standard template with standard fields. Use the IDM Word Add-in tool to customize the content and design of the label templates. You can add additional fields, including calculated fields, to each label to meet your business requirements. You can also create pick, ship, and WL SCM labels to meet the business requirements of specific customers.

You can print labels through IDM exclusively, or use IDM and another printing solution such as Enterprise Printing Platform. IDM label printing supports the same labels and additional fields as Enterprise Printing Platform except for the start and end calculated fields. You cannot print EDI labels that require a custom format through IDM.

Note: In support of this enhancement, the Enterprise Printing Platform Integration section in **Customer Setup-General** was renamed to EPP/IDM Integration. Additionally, the Enterprise Printing Platform value in the **Usage Type** field in **TWL Administration-Label Setup** was changed to **EPP/IDM Integration**.

Feature activation

To implement this feature and utilize the new label templates, you must import the templates into IDM. The templates are included in the `IDM_SX_Label_Templates` folder in the `IDM_SX_Content_11_21_7.zip` file that you can download from Knowledge Base article 1887404. The templates are saved under the SX Label Templates document type.

To print IDM labels for Integrated Barcode and cartonization, you must select the new **IDM Labels** option in **SA Printer Setup-Settings**. If you use customized templates, you must specify customized template information on printer records to override standard template output. If you use customer-specific templates, specify customized template information on **Customer Setup** records to override the template output that is set up for the printer.

To print IDM labels for TWL, you must select **IDM Label** in the new **Label Printer Model** field in **TWL Administration-Printer Setup**. If you use custom templates, you must override the label at the standard record level in **TWL Administration-Label Setup** and then edit the record at the printer record level to specify the template and the required fields.

See the *Infor CloudSuite Distribution Configuration Guide* and the *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics*.

Product improvements

These product improvements were made to support the integration to Infor Document Management.

Carton information added to pick ticket forms

If you select to print carton detail on warehouse transfer (WT) or Value Add (VA) pick tickets, it is now included on the pick ticket form for both the header and line items. Additionally, the pick ticket form for sales orders (OE) now includes the carton unit of measure for line items.

The pick ticket form is printed when you select **Print Format 4** and an **Output Type** of **IDM Output Management** for the document in **SA Administrator Options-Documents**.

An updated version of these templates is available in the `IDM_SX_Content_11_21_7.zip` file and can be downloaded from KB 1887404:

- SXOEPickTicketTemplate
- SXOEPickTicketTemplate_Portrait
- SXVAPickTicketTemplate
- SXWTPickTicketTemplate

New event notifies of IDM connection failure

A new event can be activated that will notify you via email when Infor Document Management (Format 4) forms fail to transmit to IDM.

The event, **IDMfailure-error**, uses the **IDMfailure** trigger and is set up in **SA Event Manager Activate Entry-Action**. To receive an email, modify the event to select who should receive the action, and then select **Email Message**. Specify the operator or email address to receive the email.

If no event body is specified when you activate the event, the event details are provided in the body of the email:

- Event Name: IDMfailure-error
- Event Desc: IDM Format 4 report transmission error
- Warehouse/Customer
- Operator
- Message: [Error message that is written to the IDM log]

Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

New features

These new features were added to support the integration to Infor Service Management.

Service Management forms available in Distribution SX.e

To provide a more efficient workflow that eliminates toggling between applications, you can now access several Service Management forms in Distribution SX.e.

This table shows the forms that you can access from the new Service Management module in the Distribution SX.e menu:

Category	Form	Acronym
Inquiry	Contract Invoice Listing	ISMICIL
Setup	Contract Rates	ISMSCR
	Service Types	ISMSST
Entry	Rental Counter	ISMERC
	Contracts	ISMEC
	Contract Invoicing	ISMECI
	Contract Lines	ISMECL

Category	Form	Acronym
Reports	Rental Pick List Report	ISMPL
	Contracts To Be Invoiced	ISMCTBI
	Rental Contract Agreement	ISMRA

These forms are also available from **Rental Counter** form in Distribution SX.e:

- Rental Check Out
- Rental Check In
- Purchase Information

In Distribution SX.e, the forms were updated to match Distribution SX.e design standards. Additionally, fields that do not pertain to the integration between Distribution SX.e and Service Management were removed.

Online help for the forms is maintained in the Service Management documentation library. When you are working in Distribution SX.e, use the Smart Help context application to access help content for the forms. Click a link in the Smart Help to open the Service Management documentation library in another tab.

The Distribution SX.e version of the Service Management forms are also available in Service Management. The name of Distribution SX.e versions of the form are annotated with an .sxe suffix, for example, Contracts.sxe.

Feature activation

You must specify the Service Management application URL in **SA Administrator Options-Integrations-Service Management** to enable the forms and data to display in Distribution SX.e. Operator access to the Service Management module and the individual forms is determined by standard functional security in **SA Operator Setup**. Operator access to forms that are accessed from a parent form is based on the security for the parent form.

Product improvements

These product improvements were made to support the integration to Infor Service Management.

New API call retrieves shipped quantity for inventory quantity calculations

A new API call, `sxapioegetservicerentorder`, now provides Service Management with the shipped quantity of an order line in Distribution SX.e. The value is retrieved from the word index, based on the service order (SRO) number and service line key that is included in the call. The shipped quantity is taken from the current active SRO or the most recent sales order tied to the SRO. It is used to determine inventory quantities that are used in conjunction with these settings in Service Management:

- **Enforce Allocation** option on the **Integrations Parameter** form
You can select **Enforce Allocation** to prevent service order material transactions from being posted when the item/warehouse Item On Hand quantity is less than the Allocated Order quantity. This setting ignores the **On Hand Neg** on the **Inventory Parameters** form, which allows on-hand balances to be negative.
- **Pull Current SX.e Inventory** option on the **Service Orders Transactions** form

When you select **Pull Current SX.e Inventory**, the item/warehouse Item On Hand quantity and Allocated Order quantity in Service Management are updated with the amounts from Distribution SX.e.

ION integration

These new features or product improvements were made to support the integration to ION.

Product improvements

These product improvements were made to support the integration to ION.

Salesrep elements added to API calls

These API calls were enhanced to include these new values to be used to filter the results returned in the response calls:

- `sxapiargetcustomerlistv3`
Added the `slsrepin`, `slsrepout`, and `salesterr` (Inside Salesrep, Outside Salesrep, and Territory) to limit the customer records returned by these values
- `sxapiargetshiptolistv4`
Added the `slsrepin`, `slsrepout`, and `salesterr` (Inside Salesrep, Outside Salesrep, and Territory) to limit the customer ship to records returned by these values
- `sxapiargetinvoicelistv3`
Added the Due Date criteria to limit results by invoice due date, instead of invoice date

These filters are applied when a customer or ship to number is not provided in the API call.

Ship to ID added to API calls

The Ship To element is added to these API calls:

- `sxapisfgetopeninvoicev2`
- `sxapisfgetpaidinvoicev2`
- `sxapisfgetoeorderhistoryv2`

The existing versions of the invoice calls were modified. A new version, v2, of the order history API call was created.

If the ship to number is passed in these API calls, only the invoices or orders for the ship to are returned.

This enhancement was identified as relevant for the Infor Distribution Storefront integration where the parent-child relationship is established for account records, however, it can be used by any process or third-party application that utilizes these API calls.

Employer Reference element added to ContactMaster BOD

The `EmployerReference` element is added to the ContactMaster BOD. This field is updated when you add a new contact to a **Customer Ship To Setup** record. It is populated with the **Customer Setup** number associated with the ship to record.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

New features

These new features affect multiple functions in the application.

WYSIWYG designer updated with new controls

The WYSIWYG designer in the Extension Enablement Kit was updated to include these new controls:

These controls are new:

- **Count:** Shows a number that represent a count of something, such as the number of lines on an order, and a label. The number can be bound to any property. The label can be bound to any property or resource. The control can serve as a hyperlink.
- **Expandable Card:** A container section used to group fields and other controls. It acts like an Expandable Area and looks like a Card.
- **Tag:** A colorized, pill-shaped field with text that is used to highlight data. They are dynamically sized, based on the amount of text. Tags can be used in conjunction with fields or as standalone controls.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution Sx.e for your business requirements.

Product improvements

These product improvements affect multiple functions in the application.

Field extension capabilities expanded

If you use the Extension Enablement Kit to extend your user interface, you can now specify HTML data in the **Data Description** field to assign properties to info, text, or lookup fields. You can extend the fields to apply modifications such as color and dynamically-sized tags.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

New features

These new features were added to the Pricing and Discounting module.

Alternate pricing hierarchy available for Level 2 pricing types

When a product's price is obtained from product and pricing records in Distribution SX.e, a complex pricing hierarchy logic is initiated that considers numerous factors, such product price type, product line, product category, region, etc. This pricing hierarchy follows a preset order that poses a challenge for companies that require a more flexible pricing structure.

You can now select an alternate pricing hierarchy for Level 2 pricing records. Level 2 records are pricing records set up in **PD Pricing Setup** for these price types in this order:

- Customer/Product Price Type
- Customer/Rebate Type
- Customer/Product Line
- Customer/Product Category

You can modify the order that these pricing records are applied in the pricing hierarchy. A new Level 2 Pricing Hierarchy **Override Hierarchy** selection table is added to **SA Administrator Options-Products-Pricing**. To override the default pricing hierarchy for these pricing record types, click and hold a pricing type in the list and drag it to the desired position. When you save the changes, the order in the **Override Hierarchy** list is the new order in which Level 2 pricing records are applied.

The existing option, **Use Rebate Pricing Records Before Price Type**, is also changed. This option now applies to Level 4 pricing records instead of both Level 2 and Level 4 records, because of the ability to define where Level 2 rebate records appear in the **Override Hierarchy** list. Level 4 records are pricing records set up in **PD Pricing Setup** for these price types in this order:

- Customer Type/Product Price Type
- Customer Type/Rebate Type

If the **Use Rebate Pricing Records Before Price Type** option is selected, the pricing records in the **Override Hierarchy** list are re-ordered as:

- Customer/Rebate Type

- Customer/Product Price Type
- Customer/Product Line
- Customer/Product Category

This can be overridden, however, we recommend that you keep the order of records consistent between Level 2 and Level 4 pricing records.

Feature activation

To activate this feature, change the order displayed in the **Override Hierarchy** list in **SA Administrator Options-Products-Pricing**. We recommend that you review your pricing options and verify the **Override Hierarchy** represents your company's pricing structure.

Note: All four Level 2 price types are displayed in the **Override Hierarchy** list even if not all types are selected or activated in **SA Administrator Options-Products-Pricing**. If a price type is not used, it is excluded when the pricing logic is applied in Distribution SX.e.

Product improvements

These product improvements were made to the Pricing and Discounting module.

Batch call process enabled for PD Mass Maintenance Entry

Batch call processing is now enabled for loading pricing data sets and importing data in **PD Mass Maintenance Entry**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select these service interface calls from the **Available Advanced Polling Calls** list:

- **PDEM Import From Excel to Set (Type 1, 5, 7) - pdemexcelimportupdtpdsc1**
- **PDEM Import From Excel to Set (Type 2) - pdemexcelimportundtpdsc2**
- **PDEM Import From Excel to Set (Type 3, 4, 6, 8) - pdemexcelimportupdtpdsc3**
- **PDEM Import From Excel to Set (Rebates) - pdemexcelimportupdtpdsr**
- **PDEM Load Data From Set (Type 1, 5, 7) - pdemloadpdsc1**
- **PDEM Load Data From Set (Type 2) - pdemloadpdsc2**
- **PDEM Load Data From Set (Type 3, 4, 6, 8) - pdemloadpdsc3**
- **PDEM Load Data From Set (Rebates) - pdemloadpdsr**

With these service interface calls selected, when you load a selected set or when you select **Import Excel** to load pricing records from an Excel file, a batch process is initiated that runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the load or import process to complete without timeout errors.

Project Job Management integration

These new features or product improvements were made to support the integration to Project Job Management (PJM).

Product improvements

These product improvements were made to support the PJM integration.

Project Job Management v3.21.7 certified

CloudSuite Distribution now supports a certified integration with Project Job Management (PJM) version 3.21.7. PJM is an MVPP application that manages small contract bids and large commercial jobs. PJM runs on your client system and can be integrated with CloudSuite Distribution by using ION API.

We recommend that you re-sync the CustomerPartyMaster and ShipToPartyMaster BODs after an upgrade.

See the *Infor CloudSuite Distribution Integration Guide for Project Job Management*.

Sales

These new features or product improvements were made to the Sales module.

New features

These new features were added to the Sales module.

New sales-related Coleman AI widgets

Item Recommender context applications that recommend upsell and cross-sell products are now available in **Sales Order Entry** and **Sales Customer Pricing Inquiry**. You can use the context applications to offer similar and related products to your customers, contributing to increased customer satisfaction and increased sales.

Both widgets use an open source algorithm, Implicit Recommender, to recommend related products that were previously purchased by other similar customers. The algorithm is processed by quests within Infor Coleman AI Platform. These quests are AI models in which machine learning occurs. Each context application uses a unique quest, but both use historical sales order line data from the Infor Data Lake.

When you specify a product in **Sales Order Entry** or **Sales Customer Pricing Inquiry**, each context application calls the related quest using an API endpoint to retrieve ranked product recommendations in real time. For the upsell widget, the recommended products are similar to the specified product. The recommended products are not necessarily higher-priced products, but are instead alternate products to provide customers with

purchasing options. For the cross-sell widget, the recommended products are products that other similar customers have purchased in addition to the specified product.

By default, the context applications display the product number only. Optionally, you can activate an API flow to also display the product description and price. The recommended products that are displayed in the context applications are informational only. If the customer agrees to purchase an upsell or cross-sell product, you must manually add the product to the sales order.

Feature activation

To use this feature, a license to Coleman AI Platform is required. To activate this feature, you must perform setups in Coleman AI Platform and configure the context applications in Infor Ming.le Homepages. The files that are required for implementation are included in the `ItemRecommender.zip` file that is attached to Knowledge Base article 1887404.

Optionally, import, configure, and activate the `GetItemDescandPrice` API flow in ION Desk to retrieve product description and price from product records, based on the company and products numbers.

If the ICSP, ICSW, OEEH, and OEEL tables were not previously extracted to Data Lake, then run the **SA Administrator Birst Extraction Report** to extract the data before performing setups in Coleman AI Platform.

See the *Infor CloudSuite Distribution Configuration Guide*.

Order overview information added to Sales Order Inquiry

To provide quick access to key order information, an **Overview** tab was added to **Sales Order Inquiry**. The order information is grouped in collapsible sections, also called cards, that displays data from other tabs. It is presented in standard static fields, key performance indicator (KPI) charts, and other visual components.

A Summary section and Lines section is displayed for all transaction types. The Summary section displays these elements:

- Select fields from the **Header** and **Totals** tabs.
- Counts for lines, packages, and history (backorders). Each number is a hyperlink that opens the corresponding tab.
- Color-coded tags that represent flags or conditions that apply to the order including header notes, line comments, fulfillment order, approval hold, backorders exist, substitutes not allowed, backorders not allowed, late order, and canceled order.
- Process indicator that shows the sales order stages and the related dates.
- Donut chart that displays the percentage of cost and margin for the order.

The Lines section displays donut charts with Line Types, Ship Quantity, and Return Lines data.

A Blanket Release Schedule section and Blanket Release Value section are displayed for Blanket Order (BL) transactions, excluding . The Blanket Release Schedule section displays a column chart with the date and suffix of each Blanket Release (BR) and product information. Hyperlinks to **Sales Blanket Release Entry** and **Sales Order Entry** are also provided. The Blanket Release Value section displays a column chart with the date and suffix of each BR and the value of the BR.

Existing security settings from **SA Operator Setup** are honored on the **Overview** tab. For example, if a user is not allowed to enter or view prices, then the Total Invoice amount and other price-related elements are not displayed.

Users can personalize the **Overview** tab to hide or collapse a card, change the color of tags, and make other changes. Developers can also use the Extension Enablement Toolkit to customize the tab and add additional tags to meet your business requirements. They can also increase the threshold count for summarizing Blanket Release products.

As part of this enhancement, all existing collapsible sections in **Sales Order Inquiry** were placed in cards to improve the layout and usability.

Feature activation

Access to the **Overview** tab is controlled by functionality security in **SA Operator Setup**. By default, all users that currently have access to **Sales Order Inquiry** are given access to the **Overview** tab.

Product improvements

These product improvements were made to the Sales module.

Personalized sort order limitation resolved

If Infor Support advised you to remove personalized default sort settings from the Orders grid in **Sales Order Inquiry**, you can now re-apply them. Removal of the settings was a temporary solution to an advanced search issue that was caused by a recent enhancement. The issue is now resolved. You must use Personalization to apply the default sort order to individual grid columns.

Tax Group field required for taxable line items

The **Tax Group** field in **Sales Order Entry-Advanced Line Entry Extend** window is now required when you enter an order line for a taxable customer or product.

Previously, it was possible to delete the default value in this field and leave it blank on a taxable line. Now, the error `Invalid Tax Group (4217)` is displayed. If the intention is to create the line as nontaxable, the appropriate Tax Group must be selected.

Note: If the company is Canadian, the **Tax Group** can be blanked out in this situation to indicate the order line is nontaxable.

Batch call processing enabled for Quick/Easy Line Entry

Batch call processing is now available for **Sales Order Entry-Easy Line Entry** and **Quick Line Entry**.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, and select the `OEET-Quick/Easy Line Multi Line Create - oemultilinecreate`

service interface call from the **Available Advanced Polling Calls** list, a batch process is initiated when you use Easy Line Entry or Quick Line Entry in **Sales Order Entry**. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows either line entry function to complete without timeout errors.

Note: This may resolve situations where orders are entered remotely where an interrupted or slow internet connection may cause delays and, subsequently, duplicate order lines.

Sales Manager

These new features or product improvements were made to the Sales Manager module.

Product improvements

These product improvements were made to the Sales Manager module.

SM Gov Tax Recalculation Report no longer updates credit card tendering

The **SM Government Tax Recalculation Report** is used to recalculate sales tax on uninvoiced sales orders. This report is modified to no longer create credit card authorizations nor adjust or create tendering transactions for the difference in the tax amount on sales orders. Previously, these adjustments created discrepancies in how data was processed, primarily if Force Sale Management was implemented.

If payment adjustments are required on a sales order after taxes are changed by this report, you must manually make the changes in **Sales Order Entry** and possibly re-tender the order. If a tax amount change is not re-tendered, it is shown as an amount due after invoice processing.

System Administrator

These new features or product improvements were made to the System Administrator module.

Product improvements

These product improvements were made to the System Administrator module.

Changes to files submitted by SA MTD VAT Reporting

Her Majesty's Revenue and Customs (HMRC) has completed a review of the fraud prevention headers submitted to HMRC when the **SA MTD VAT Reporting** is run. Because CloudSuite Distribution operates in a private

network, not a public one, certain fraud prevention headers are now removed. These new headers are now included in each API call initiated by the report:

- Gov-Client-Local-IPs-Timestamp
- Gov-Vendor-Product-Name
- Gov-Client-Local-IPs

These changes are made to ensure Infor's adherence to HMRC's Making Tax Digital requirements.

Processing time improved

Changes were made to the **SA Data Archive Orders Report** to improve its processing time.

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

Product improvements

These product improvements were made to the TWL module.

Improved clarity in TWL User Specific Configuration field labels

Several field labels in **TWL Administration User Specific Configuration** are changed to better reflect their purpose. The **Copy** button for the User Specific Configurations grid is now labeled **Copy from Warehouse**.

When you drill into a line item in the **TWL Administration User Specific Configuration** grid, these field labels are updated on the **Detail Overview** page:

- **Default Answer Is 'Yes'**
- **Create Employee Specific Version On Next Encounter**
- **Automatically Answer With The Default**

Non-labor lines able to be set to lost business after counter sale order

You are now able to set non-labor lines to lost business after a Counter Sale (CS) order is dropped to TWL. This change supports those situations where a customer changes their mind about an item after the order is dropped to the warehouse and requests that the item be removed from the order.

Previously, you were prevented from setting CS lines to lost business after the order was dropped.

Search time improved in TWL Receipt Inquiry

To prevent search query timeouts that can occur with large data sets, a record limit was added to **TWL Receipt Inquiry**. The default record limit is 500, but you can change the value. Data index usage was also updated to improve search time.

New ship date field added to Advanced Search in TWL Order Drop Manager

The new **Match Expected Date Type** field is added to the **Advanced Search** view in **TWL Order Drop Manager**. The **Match Expected Date Type** gives you the option to only display orders with the exact expected ship date.

Previously, the query would return all orders up to and including the expected ship date.

Value Add

These new features or product improvements were made to the Value Add module.

Product improvements

These product improvements were made to the Value Add module.

Customer forecasting enhancement for Value Add

Using customer forecasting, you can accommodate anticipated new sales in addition to the actual usage for the previous 25 months when you factor anticipated volume and its effect on replenishment recommendations for the next 12 months. When you use customer forecasting, the total forecast quantity to order or transfer for all active forecasts is now included in the replenishment recommendations of the **VA Entry Recommended Replenishment Report**. This customer forecast quantity is used to calculate the order point and line point for replenishment, and it now displays on the report.

However, this report currently only reviews forecasts for the period specified when the replenishment function is run. It does not consider forecasts outside of the date range for which the report is run. This does not allow distributors to procure inventory needed when customer forecast periods start, especially for products with longer lead times.

This enhancement includes controls to allow consideration of product lead times for VA products when calculating the impact of customer forecast usage on VA replenishment recommendations.

Two options in **SA Administrator Options-Products-Replenishment** can be used when you run the **VA Entry Recommended Replenishment Report**. When **Include Lead Time** is selected, a product's lead time is added to the current date when searching for active customer forecasts to include in the replenishment report.

A second option, **Ramp Up Days**, can be used to specify the number of days to add to the calculated forecast date when searching for active forecasts. This is optional and is recommended when products have particularly long lead times.

Feature activation

To include accurate replenishment calculations in the **VA Entry Recommended Replenishment Report**, set up customer forecasts in **Product Customer Reservation/Forecast Setup** and set up the VA fabricated product's **Average Lead Time** in **Product Warehouse Product Setup**.

Enable these options in **SA Administrator-Products-Replenishment** for customer forecasting:

- **Include Lead Time?**
- **Ramp Up Days**

If **Include Lead Time** is not selected, then lead times are not added to the start and end dates when searching for active forecasts, and the calculations used to determine the quantity to replenish for forecasts is unchanged.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 7: June 2021 Production Update

This section describes the details of the June 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **June 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution Sx.e, organized by module or component.

Customer

These new features or product improvements were made to the Customer module.

New features

These new features were added to the Customer module.

New event notification for payment by credit hold customer

You can now receive a notification when a payment is received from a customer on credit hold who is not allowed to order products. The notification can prompt credit managers and other appropriate staff to review the customer's sales order status and open order activity after payment is made against their outstanding balance.

The new **ar-nosa!espayment** event in **SA Event Manager Activate Entry** informs a selected user when AR cash posting functions are made to create a payment record for a customer with a **Sales Order Status** of **No** in **Customer Setup**. The event uses the new **ar-createcheck** trigger, which is located in both **Customer Cash Receipt Entry** and **Customer Entry Lockbox Update Report**.

Feature activation

Enable the notification by activating the new **ar-nosa1espayment** event in **SA Event Manager Activate Entry**.

Product improvements

These product improvements were made to the Customer module.

Ship To range added to Customer Period Analysis Report

An optional **Ship To** selection range is now available in the **Customer Period Analysis Report**. Some distributors set up job sites or projects as individual records in **Customer Ship To Setup**. Customers in **Customer Setup** can have many **Customer Ship To Setup** records. This new selection range is useful to produce reports for a specific **Customer Ship To Setup** record, which assists with the credit management and collection process.

Distribution Analytics for Birst

These new features or product improvements were made to the Distribution Analytics content for Infor Birst.

New features

These new features were added to the Distribution Analytics content for Birst.

In-Context CSD Analytics now supported

A new context application named In-Context CSD Analytics, which uses the Birst In-Context Business Intelligence (ICBI) widget, is available in Infor Ming.le. The new context application panel displays specific Birst Visualizer charts and reports filtered by the business context messages from CloudSuite Distribution. For example, the Customer Transaction Count report in **Customer Inquiry-General** and **Customer Setup-General** displays a bar graph that illustrates the selected customer's Orders Entered (count of total orders by entered date) and Orders Invoiced (count of total orders by invoice date) data points.

The In-Context CSD Analytics context application displays data on these CloudSuite Distribution pages, based on the selected customer, vendor, or product:

- **Customer Inquiry-General**
- **Customer Setup-General**
- **Product Availability Inquiry-Product**
- **Product Inquiry-General**
- **Product Setup-General**
- **Vendor Inquiry-General**

- **Vendor Setup-General**

In-Context CSD Analytics reports use current Birst models stored in the Data Lake. The Data Lake is populated to the Birst data warehouse nightly.

Customer reports

These in-context reports are available in **Customer Setup** and **Customer Inquiry**:

- # Orders by Stage Code
- Customer Sales by Salesrep
- Customer Scorecard Report MTD
- Customer Scorecard Report YTD
- Customer Transaction Count
- Top 5 Product Categories by Customer - MTD
- Top 5 Product Categories by Customer - YTD

Product Availability reports

These in-context reports are available in **Product Availability Inquiry**:

- # Order Lines by Warehouse-Product
- # PO Lines by Warehouse-Product
- Customer Order Lines by Warehouse-Product
- Vendor PO Lines by Warehouse-Product
- Warehouse-Product Sales Order Quarterly Scorecard Report
- Warehouse-Product PO Lines Quarterly Scorecard Report
- Warehouse-Product Transaction Chart

Product reports

These in-context reports are available in **Product Setup** and **Product Inquiry**:

- # Order Lines by Product
- # PO Lines by Product
- Customer Order Lines by Product
- Vendor PO Lines by Product
- Product Sales Order Quarterly Scorecard Report
- Product PO Lines Quarterly Scorecard Report
- Product Transaction Chart

Vendor reports

These in-context reports are available in **Vendor Setup** and **Vendor Inquiry**:

- # POs by Stage Code
- Top 5 Product Categories by Vendor - MTD
- Top 5 Product Categories by Vendor - YTD
- Vendor Scorecard Report MTD

- Vendor Scorecard Report YTD
- Vendor Transaction Count

Feature activation

The In-Context CSD Analytics context application must be configured for your tenant by your Infor Ming.le system administrator. Additionally, access to the In-Context CSD Analytics context application is granted based on your user role. See the *Infor CloudSuite Distribution Configuration Guide*.

Infor CloudSuite Distribution Analytics provides you with Birst Visualizer reports that are designed and developed specifically for the ICBI widget. You can customize the screens where ICBI reports display through the tagging feature within Birst. See the *Infor Distribution Analytics for Birst Development Guide*.

Product improvements

These product improvements were made to the Distribution Analytics Content for Birst.

New Reset AP and AR Space workflows available

Two new workflows are available to run manually in case of data discrepancies in the Accounts Payable (AP) and Accounts Receivable (AR) Birst spaces. The workflows are named `CSD ReLoad AP` and `CSD ReLoad AR`. You can use these workflows to delete and re-extract all data for the respective spaces, which can be helpful when resolving data discrepancies.

Feature activation

The workflow is included in the Infor Distribution Analytics content provisioned for your tenant by Infor Cloud Operations, but it must be run manually. We recommend you contact your Infor Consultant before deleting and re-extracting all data in your Birst spaces.

See the information in the *Infor CloudSuite Distribution Configuration Guide* on troubleshooting Birst data mismatch issues.

Distribution Analytics for Birst content updated

The updated Distribution Analytics for Birst content is available for each tenant in a strategic release schedule. This approach maximizes the availability of each tenant's data and Infor's Customer Support resources.

With this content release, the default Birst workflows are enabled. If your tenant uses custom workflows, then you must disable or reschedule the default workflows so they do not override your custom workflows.

Disable the default workflows with these steps:

- 1 Log in to Infor Ming.le and select the Birst application.
- 2 Click **Admin** in the menu.
- 3 Select **Orchestration**.
- 4 Search for **CSD Analytics Daily Extract and Process**.

- 5 Click the **Actions** arrow to the right of **CSD Analytics Daily Extract and Process**, then select **Scheduling**.
- 6 Click **Edit Schedules**.
- 7 Toggle each schedule to disable them, then save your changes.

See more information about disabling default workflows in *KB 2202593*.

Infor CloudSuite Field Service/Infor Service Management

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service/Infor Service Management.

New features

These new features were added to support the integration to CloudSuite Field Service/Infor Service Management.

CloudSuite Field Service renamed

Beginning with the June release, CloudSuite Field Service will be renamed to Infor Service Management. References to CloudSuite Field Service in the associated documentation will be updated, where appropriate, to reflect the change.

Product improvements

These product improvements were made to support the integration to CloudSuite Field Service/Infor Service Management.

Additional BOD values ensure correct AP invoice calculations

The Process.Invoice BOD that is generated by Infor Service Management and consumed by Distribution SX.e was modified to include additional data for each Invoice BOD line that represents a re-rent product. This change addresses adjustments to the original amount owed to the vendor that are required when partial check-ins or early check-ins are invoiced.

These elements were added to the UserArea in the InvoiceLine section of the Process.Invoice BOD:

- AdjustedLineQty
The adjusted line quantity is the quantity of product that you are renting from a vendor. If the value is positive, you are renting product from your vendor and owe a rental fee. If the value is negative, you have returned some or all of the products to your vendor before the next rental payment is due and should receive a credit.
- OrigPOCost

The original purchase order cost is the amount that you are paying your vendor each rental period for the product.

- **OrigPOVendNum**

The vendor number from the original purchase order is used to find the **Vendor Setup** record to determine if the Accounts Receivable workflow for vendor invoicing is used. If **Accounts Receivable** is selected in the **Rental Invoice Source** field, then an AP invoice is created in **Vendor Invoice Center Entry** when the Invoice BOD is processed.

The amount of the AP invoice is calculated by multiplying the adjusted line quantity by the original purchase order cost. If multiple lines for re-rent products from the same vendor are included in the Invoice BOD, the amounts for the lines are totaled to determine the amount for the AP invoice. If the total amount is positive, the AP invoice is created as an expensed invoice for the amount that you owe your vendor for the rented products. If the total amount is negative, the AP invoice is created as an expensed miscellaneous credit for the amount of a refund the vendor owes you for the items that you returned.

Infor CRM integration

These new features or product improvements were made to support the integration to Infor CRM.

New features

These new features were added to support the Infor CRM integration.

Inbound Process Quote BOD supported

The inbound Process Quote BOD is now received from ION and used to promote a quote order in Infor CRM to a Quote Order (QU) in Distribution SX.e.

Enhancements are made to BOD handling in Distribution SX.e to consume the Process Quote BOD from Infor CRM. Upon receipt of the Quote BOD, a Quote Order is created in Distribution SX.e that can be maintained in **Sales Order Entry**. As with sales orders received from Infor CRM, you cannot maintain a quote order in Infor CRM after it is promoted to Distribution SX.e

After receiving the inbound Process Quote BOD, Distribution SX.e returns an acknowledgment Process Quote BOD to Infor CRM with the details of the new Quote Order. If the inbound Process Quote BOD encounters errors, Distribution SX.e returns Confirm and Acknowledgment Quote BODs with the error information.

Previously, quote orders from Infor CRM could not be promoted to Distribution SX.e.

Feature activation

The inbound Process Quote and outbound Process Quote BODs must be configured for the connection point to ION, as well as the document flow between Distribution SX.e and Infor CRM. A new sample document flow, `SX_CRM_DocumentFlow_Sample.xml`, can be downloaded from KB article 1887404.

See the *Infor Distribution SX.e Integration Guide for Infor CRM* for instructions for imported and updating the document flow.

Integration updates

Additional features or enhancements were made to support these integrations.

MS Dynamics 365 CRM integration now certified

An integration to the Microsoft Dynamics 365 CRM application is now supported. Using Infor ION business object documents (BODs) and API calls, the integration supports synchronization of master account and contact information, product records, and sales order transactions. API calls support access from MS Dynamics CRM to CloudSuite Distribution for real-time product availability and price information.

See the *Infor CloudSuite Distribution Integration Guide for MS Dynamics 365 CRM* for more information and configuration instructions.

Salesforce integration now certified

An integration to the Salesforce CRM application is now supported. Using Infor ION business object documents (BODs) and API calls, the integration supports synchronization of master account and contact information, product records, and sales order transactions. API calls support access from Salesforce to CloudSuite Distribution for real-time product availability and price information.

See the *Infor CloudSuite Distribution Integration Guide for Salesforce* for more information and configuration instructions.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

Product improvements

These product improvements affect multiple functions in the application.

Extension improves Elasticsearch searches

An extension that forces all Elasticsearch-based searches to include the AND operator by default is now available. For example, if you specify 'flange bearing' in a Product lookup field, the results will include only those products that include both 'flange' and 'bearing'.

Contact the Infor Cloud team to implement the `extension-and-search` extension in **SA Extension Administration**.

Overseas Trade

These new features or product improvements were made to the Overseas Trade module.

Product improvements

These product improvements were made to the Overseas Trade module.

Line detail from Overseas Trade transaction included on report

The line detail included on the **OT Master List Report** is now extracted from **OT Transaction Entry** detail, rather than **Purchase Order Entry** detail. This ensures that any changes made to the PO line detail in **OT Transaction Entry**, such as to add a line or change order quantities, is reflected accurately on the report.

Line detail is included on the **OT Master List Report** when you select **yes** to **Print Line Items**.

Purchase

These new features or product improvements were added to the Purchase module.

Product improvements

These product improvements were added to the Purchase module.

Batch call process enabled for Purchase Order Inquiry

Batch call processing is now enabled for line detail search in **Purchase Order Inquiry**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select the **POIP Line Detail Search - poipbuildpolist** service interface call from the **Available Advanced Polling Calls** list. With this service interface call selected,

when you select Advanced Search in **Purchase Order Inquiry** and select **Line Detail** in the **Display** criteria, a batch process is initiated that runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the Advanced Search of line detail to complete without timeout errors.

ASN receipt information for POs now available

Advanced shipping notice receipt information for purchase orders sent to TWL is now displayed in **Purchase Order Inquiry** on the **Warehouse Logistics Inquiry** view.

A new **Receipts** field in the Warehouse Logistics section of the **Warehouse Logistics Inquiry** view lists the receipts received against purchase orders.

Sales

These new features or product improvements were made to the Sales module.

New features

These new features were added to the Sales module.

Direct POs and WT's for kit component sourcing supported

You can now create direct purchase orders (PO) or warehouse transfers (WT) in **Sales Order Entry** to source components for build on demand (BOD) kits. Use direct POs and WT's to ship the components directly to customers to save time and freight costs for you and your customers in situations where:

- The kit will be assembled at the customer site.
- The size or weight of the component is too large for your warehouse.

Kit component sourcing is initiated on the **Kits** page in **Advanced Line Entry**. You can create a direct PO or WT for components on these pages:

- **Kits-Component Sourcing**
- **Multi-Comp Sourcing**

When you source a kit component using a direct PO or WT, you cannot ship the kit on the sales order until after you receive the direct PO or WT. Additionally, you cannot zero ship a component to source a component that is in stock. Instead, you can change the line type for the component to special. You can also backorder the component if the component is enabled for backordering in **KP Component Setup**.

These functions were modified to process direct components:

- **Sales Order Entry, Sales Entry Pick Tickets Report, and Sales Shipping Feedback Entry:** When the order is processed, direct components do not affect the committed or reserved balances in **Product Warehouse Product Setup**.

- **Sales Entry Pick Tickets Report** and **Sales Entry Processing Delivery Document Report**: Direct components are not included on the report.
- **Sales Entry Processing Back Order Fill Report**: The **DO?** value is **yes** on the Specially Handled Receipts Report when the direct component is filled.
- **Sales Entry Processing Acknowledgements Report**: Direct components are flagged.
- **Sales Entry Invoice Processing Report**: Direct components are flagged. Their cost is not recalculated. Transaction records are created in **Product Adjust Non-Stock/Direct Order Entry**. Direct components are posted to direct General Ledger accounts for inventory and cost of goods sold.
- **Transfer Entry Print WT Report**: The net amount for components on direct WT are from the tied line or component.

Note: If you use Infor Document Management to print acknowledgments and invoices, the direct component flag is included on the standard forms in the `IDM_SX_Content_11_21_6.zip` file posted to KB 1887404 on the Infor Support Portal. If you use custom templates, you must manually update them to include the direct component flag.

Product improvements

These product improvements were made to the Sales module.

Format of line item values updated

The formats for these values in the Line Items grid on the **Edit Lines** page in **Sales Order Entry** now match the formats used in the Order Lines grid in **Sales Order Inquiry-Line Detail**:

- | | |
|---------------------|--------------------|
| • Discount Amount | • Margin Amount |
| • Discount Percent | • Margin Percent |
| • Discount Type | • Net Price |
| • EHF Amount | • Price |
| • EHF Exempt Amount | • Product Cost |
| • EHF Net Amount | • Quantity Shipped |
| • Kit Split Amount | • Unit Conversion |

Order origin code for counter sales updates sales order

The default order origin code for counter sales now updates a Counter Sales (CS) order when these conditions are met:

- An origin code is set up for a Counter Sale in **SA Table Code Value Setup**. **counter sale** must be selected in the **Background Function** field on the origin code record.
- You did not manually specify an origin code on the **Sales Order Entry-Initiate** page when you first created the CS order.

If you do not set up an origin code for a Counter Sale, the default order origin code that is specified in the **SA Administrator Setup-Documents-Sales Orders-Entry Settings** is used for CS orders.

Note: You must add the **Origin Code** field to the **Sales Order Entry-Initiate** page using Personalization. The default origin code for a CS order does not automatically display in the **Origin Code** field on the **Initiate** page. The code is applied to the order later in the workflow, after you leave the **Initiate** page.

Sales Demand Invoices Report options defaults updated

These **Sales Demand Invoices Report** options are no longer required fields:

- **Enter a List of Order #'s?**
- **Print Fully Tendered Counter Sales?**

Both fields have default values of **No**. This change resolves an issue that prevented the **Sales Demand Invoices Report** from printing automatically, based on the **Print Invoices at Shipping** option in **Product Warehouse Description Setup**.

Ship To selection range added to Sales Demand Invoices Report

An optional **Ship To** selection range is now available in the **Sales Demand Invoices Report**. Some distributors set up job sites or projects as individual records in **Customer Ship To Setup**. This new selection range is useful to print invoices on-demand for a specific **Customer Ship To Setup** record.

Note: The new selection range option does not change the order in which generated invoice documents are sorted, most notably when printing invoices to Format 4 forms using Infor Document Management.

Warning displayed when ship to address changed

When you use system rates for calculating sales taxes in **Sales Order Entry** and change the ship to address after creating lines on an order, a warning is now displayed: *Ship To Address Change - Review Taxes and Totals*.

You must review the amounts calculated for the order on the **Taxes and Totals** view and manually update the jurisdiction and click **Recalculate** to match the new ship to if necessary. The jurisdiction is not updated automatically in this situation.

System Administrator

These new features or product improvements were made to the System Administrator module.

New features

These new features were added to the System Administrator module.

Improved open journal tracking

System administrators can now track GL journals that have not been properly closed and notify the operators on the journals. The new **sa-jrnlopen** event in **SA Event Manager Activate Entry** informs the specified users when the new **SA Open Journal Assignment Report** has found an open journal within the specified report criteria.

Additionally, the **sa-jrnlopen** event is triggered to search for open journals before disconnecting the operator in these scenarios:

- The system administrator selects one or more operators and performs a **Clear User** operation in **SA Connection Inquiry**
- The system administrator clears operator sessions in **SA Administrator Operator Disconnect Report**

Batch journals, which are intended to remain open for an extended period of time, are excluded from triggering the **sa-jrnlopen** event to notify operators. Batch journals are displayed in the new **SA Open Journal Assignment Report**.

Feature activation

Notification of open journals is controlled by activating the new **sa-jrnlopen** event in **SA Event Manager Activate Entry**. Once the event is active, it can be reviewed in **SA Event Manager Transaction Inquiry**. You should also assign the proper security level in **SA Operator Setup** to the new **SA Open Journal Assignment Report** for those operators who should have access.

Product improvements

These product improvements were made to the System Administrator module.

Adjusted Operator Time added to SA Journal Setup

Two fields are added to **SA Journal Setup** to display the time a journal was assigned and closed in the time zone of the user viewing the journal record.

The new **Adjusted Operator Time** fields for the Assigned journal time and the Closed journal time display the Assigned and Closed times adjusted for the user's time zone. For example, if the journal is created at 8:30 AM Eastern Standard Time, and the operator viewing the journal record in **SA Journal Setup** is in the Mountain Standard Time region, the **Adjusted Operator Time** for the Assigned time is 6:30 AM.

The Assigned and Closed times are no longer converted to the viewing user's timezone. They are the actual times recorded for the journal record when it was saved, and are based on the time zone of the operator who saved the journal.

Note: We recommend you do not change the Assigned and Closed dates and times. However, if a change is required, you should honor the same time zone in which the original times were posted.

Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake using the **SA Administrator Birst Extraction Report**:

- icseh
- oeehta
- poelo

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

New features

These new features were added to the TWL module.

New inquiry enables mass reversal of TWL orders in picked stage

You can now retrieve dropped orders from TWL and revert the order stage from Picked to Ordered for large lists of orders when you select **Undo OE Order Picking Stage** from the new **Sales TWL Undo OE Order Picking Stage Inquiry** function. This allows you to quickly maintain a group of orders by undropping them at one time. After orders are undropped, you can maintain them in **Sales Order Entry** or **SA Mass Maintenance Administration**, and then re-dropping to TWL.

To modify a **Sales Order Entry** order that has been moved to TWL, the order must be in an undropped TWL order stage. The **Sales TWL Undo OE Order Picking Stage Inquiry** retrieves a list of **Sales Order Entry** orders for a TWL warehouse that are currently in a picked stage. After the order is undropped, you unallocate the order from the warehouse floor and revert the order stage from picked to ordered.

Feature activation

To use **Sales TWL Undo OE Order Picking Stage Inquiry**, **SA Operator Setup** permissions must be granted to users that are familiar with TWL standard practices and order management.

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Managing Orders*.

Product improvements

These product improvements were made to the TWL module.

Zero now valid entry for position and level positions in TWL Multiple Location Create

Zero is now a valid entry for both the **Position** and **Level** positions in **TWL Multiple Location Create**.

Transfer

These new features or product improvements were made to the Transfer module.

New features

These new features were added to the Transfer module.

New notification for transfer backorder fill

You can now receive a notification when a warehouse transfer has been filled through the back order fill process. The notification can prompt the appropriate personnel to manage and update the warehouse transfer. Previously, warehouse personnel manually reviewed all allocation reports to determine if a warehouse transfer was filled, then notified the user who created the warehouse transfer.

Feature activation

Enable notifications by activating the new `wt-bofillallocrpt` event in **SA Event Manager Activate Entry**. The event informs a selected user when a warehouse transfer is filled by the **Sales Entry Processing Back Order Fill Report** process.

Product improvements

These product improvements were made to the Transfers module.

Alternate order number added to transfer pick ticket XML output

The alternate order number data stored with a tied warehouse transfer is added to the XML output for the WT pick ticket. These fields are now included in the Line level data of the XML output for pick tickets when printing to Format 4 and using Infor Document Management (IDM) or a third-party forms application:

- TieType (example, 'o' for order)
- TieNumber (tied order number)
- TieSuffix (tied order suffix number)

Note: The standard pick ticket template for IDM was not updated to include this detail. To print this detail on your pick ticket, you must create a custom SXWTPickTicketTemplate and include the alternate order elements on your forms.

Vendor

These new features or product improvements were made to the Vendor module.

Product improvements

These product improvements were made to the Vendor module.

New option creates 1099 output for prior year

The Internal Revenue Service (IRS) now accepts 1099-MISC forms after December 31, or after the end of the current calendar year. This requires that you specify the proper reporting period when you run the **Vendor Administrator Federal 1099 Print** after December 31st. You must take care to select data for the prior year but populate the Prior Year Indicator properly in the 1099 output to avoid rejection by the IRS.

A new option is added to the report to allow you to select the prior tax reporting year. When you select **yes** for the new option, **For Prior Tax Year**, these changes occur:

- The Prior Year Indicator, 'P', is loaded in Position 6 of the T record.
- The selection for the option, **(C)urrent or (P)revious Year's Payments** is checked.
 - If **Previous** is selected, data is extracted from the **Payments Last Year** in **Vendor Setup**. The Payment Year is updated with the current year minus 1.
 - If **Current** is selected, and you are sending output to Magnetic Media, the message `Cannot Use Current Year Payments to Generate Prior Tax Year Report` is displayed. No output is generated.
- The Prior Year Indicator is no longer updated based on your selection for the **(C)urrent or (P)revious Year's Payments** option.

When you select **no** for the **For Prior Tax Year** option, the Prior Year Indicator is blank. If **Current** is selected for the **(C)urrent or (P)revious Year's Payments** option, data for the 1099 output is extracted from the **Payments Year to Date** for each vendor in **Vendor Setup**. The Payment Year for the 1099 output is updated with current year. If you have already run **Vendor Administrator Year End, Payments Year to Date** amounts are moved to **Payments Last Year**. Select **Previous** and data is extracted from **Payments Last Year**. The Payment Year is updated with the current year minus 1.

Business rule resolves date inconsistencies for UK companies

Notes added to invoices in **Vendor Invoice Center Entry** are now assigned a date using the format defined in the new DatabaseDateFormat business rule. If you are a company operating in the United Kingdom, you must change the date format for the business rule in **SA Business Rule Setup** by setting the **Rule Value** from

mdy to **dmy**. This ensures the notes date, which is a primary key for search, is assigned using the appropriate format and does not cause errors.

Note: The business rule may not exist in **SA Business Rule Setup**. If not, you must create it using the **SA Table Code Value Setup-Business Rules** template for the standard DatabaseDateFormat rule.

This business rule is applied to any notes created after the business rule's **Rule Value** is set. Contact Infor Support to request assistance with resolving any existing invoice note records created with a US-formatted date. They can provide assistance in running a data scrub routine to fix the primary key on existing records.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 8: May 2021 Production Update

This section describes the details of the May 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **May 2021** link.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Online help translated to Canadian French

The Distribution SX.e online help is now translated to Canadian French. The translated help can be viewed in the Smart Help context application when you select **French (Canada)** as your default language in Infor Ming.le **User Settings**.

The translated help can also be accessed on Infor Documentation Central (docs.infor.com) when you select **Infor CloudSuite > CloudSuite Distribution**. Select the globe icon in the upper right corner to select the Canadian French language to view the link to the translated help.

The *Infor Distribution SX.e User Guide* is also translated to Canadian French and is available on Infor Documentation Central.

Important: The translated online help and user guide are updated to version 20.8. Until the Canadian French online help is updated to the current application version, use the English online help or guide to review topics added for features in version 20.9 and later.

Please note, the translated online help and user guide are available and supported for CloudSuite Distribution tenants only.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

Bulk Delivery

These new features or product improvements were made to the Bulk Delivery module.

New features

These features were added to the Bulk Delivery module.

New Bulk Delivery module

A new module, Bulk Delivery, is added to Distribution SX.e to manage non-durable, bulk goods that are usually stored in tanks, drums, totes, pails, etc. These storage tanks are generally located on site at lube shops or dealerships. The Bulk Delivery module is used to manage the storage types and replenishment and delivery of material in each storage device.

The Bulk Delivery module can be set up to forecast replenishment and facilitate delivery of bulk products in the field. This includes estimating the quantity remaining in storage devices, such as tanks, and estimating the quantity needed to fill tanks.

Bulk Delivery can also be used to group orders for delivery by assigning them to trucks or truck compartments, and printing delivery documents such as driver cards, load sheets, and meter tickets.

Bulk Delivery functions

The Bulk Delivery module is comprised of these functions:

- Bulk product setup:
 - **BD Tank Master Setup**
 - **BD Truck Master Setup**
- Bulk product replenishment:
 - **BD Administrator Tank Calculations Report**
 - **BD Demand Center Entry**
 - **BD Entry Recommended Tank Replenishment Report**

- Bulk delivery management:
 - **BD Load Center Entry**
- Bulk delivery printing:
 - **BD Entry Print Driver Card Report**
 - **BD Entry Print Load Sheet**
 - **BD Entry Print Meter Ticket**
- **BD Entry TWL Update** is used to update inventory in TWL warehouses

Updated processes

These existing Distribution SX.e functions are updated to support the new Bulk Delivery module:

- **Product Setup**
Bulk materials are identified by selecting the **Bulk Delivery** option in **Product Setup-General**.
- **Product Extended Cross Reference Setup**
Create cross reference records for excess bulk product storage, such as for drums.
- **Sales Order Entry**
Bulk delivery orders may be entered in **Sales Order Entry** as an alternative to automatic order creation in **BD Demand Center Entry**. Bulk delivery products are limited to Stock Orders (SO), Return Merchandise (RM) orders, and Correction (CR) orders. A **Tank ID** field is added to the **Advanced Line Entry** window in the Extended Fields section. This field is required for products set up as bulk delivery products.
- **Sales Shipping Feedback Entry**
After delivery, this function is run to update the bulk product's quantity shipped with the actual quantity of bulk product delivered. This also updates the sales order stage to Shipped (3).
- **Sales Entry Invoice Processing Report**
After delivery and update of the order stage, the bulk delivery sales order can be invoiced.
- **SA Table Code Value Setup**
Values from these new Bulk Delivery tables are used during truck and tank setup: Delivery Group, Fill Cycle, Truck Type, and Unit.

Feature activation

The Bulk Delivery module is included in the core set of modules delivered with Distribution SX.e version 21.5. To activate the Bulk Delivery module, select the **Bulk Delivery Active** option in **SA Administrator Options-Documents-Sales Order-Processing**. Enable function security for your personnel for access to Bulk Delivery functions in **SA Operator Setup-Function Security**.

Customer

These new features or product improvements were made to the Customer module.

Product improvements

These product improvements were made to the Customer module.

Invoice selection improved in Customer Cash Receipt Entry

Multiple workflow enhancements are added to **Customer Cash Receipt Entry** to reduce keystrokes and expedite payment processing.

When you apply a customer's payment using the **Invoice # Apply To Type** option, you are now taken directly to the invoice in the Invoices grid in **Customer Cash Receipt Entry**. The specific invoice is highlighted in the grid and is checked, ready to be paid.

A new dialog window, **Select From Duplicate Invoices**, is displayed if you select **Invoice** in the Apply To **Type** field, and multiple invoices exist with the same invoice number. If a single invoice exists for the exact amount specified, it is selected by default. Otherwise, you can select the correct open invoice for the customer/ship to from the list and click **OK**. The invoice information is defaulted in the **Cash Receipt Entry** window. Any miscellaneous credits available for the customer are also listed.

If the Invoice # is specified with a 00 suffix, all suffixes for the selected invoice are listed in the **Select From Duplicate Invoices** window.

Infor CloudSuite Field Service integration

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service.

New features

These new features were added to support the integration to Infor CloudSuite Field Service.

Invoice milestone billing supported

Invoice milestone billing is now supported with the integration to Service Management. Invoice milestone billing is scheduled billing activity against a Project Fixed operation on a service order in Service Management. When a milestone is invoiced in Service Management, a matching General Ledger posting is made in Distribution SX.e. The GL posting equals the value of the milestone, not the value of the operation, ensuring General Ledger is synchronized with the Service Management invoice.

When Service Management generates a ServiceOrder BOD to create a sales order in Distribution SX.e, line items are created for each Project Fixed operation and its corresponding transactions. The ServiceOrder BOD indicates whether invoice milestone billing was applied to an operation with a new **InvoiceMilestone** property. The value of the property is true when **Use Invoice Milestones** is selected on the **Service Order Operations** form in Service Management.

The line items for an operation and its related transactions are adjusted on sales orders to accommodate milestone billing. The value of the operation is displayed in the **Net Amount** field for the operation line item. The quantity shipped for the operation line item is 0 to prevent the line from being invoiced for the entire value. Additionally, the value of each related transaction is 0.

For an operation line item, the value of the operation is displayed as the net amount but the shipped quantity is set to 0.

When a milestone is reached, it is invoiced in Service Management. An Invoice BOD is generated that indicates whether the billed amount is associated with a milestone with a new **InvoiceMilestone** property. The value of the property is true when **Use Invoice Milestones** is selected on the **Service Order Operations** form and an invoice milestone was billed.

When the Invoice BOD is consumed by Distribution SX.e, a line item is added to the sales order for the milestone amount. The quantity ordered on the new line equals the quantity shipped, and the net amount equals the amount of the milestone invoice. The order is shipped and invoiced for the milestone amount. After the order is invoiced processed, these events occur:

- The amount of the milestone invoice is posted to the General Ledger.
- A backorder is created with the operation and transactions lines from the original order, including the amounts. The backorder is in Stage 1-Ordered.

When the next milestone is reached and invoiced, a new line for the milestone amount is added to the backorder. The backorder is shipped and invoiced, and the amount of the milestone invoice is posted to the General Ledger. Another backorder is created with the operation and transactions lines from the original order. The process repeats each time a milestone is reached and invoiced.

After the final milestone is invoiced and the operation is set to complete in Service Management, a ServiceOrder BOD is generated. Because invoice milestone billing was used for the operation, none of the remaining lines on the backorder that are related to the operation can affect the General Ledger. These updates are made to the backorder:

- The Net Amount for the operation line is changed to 0.
- The quantity shipped for the operation line is changed to 1.

If the operation is the last operation on the order, the order can be shipped and then invoiced with no amount due and no impact to the General Ledger. Alternatively, you can close the service order to cancel to sales order in Distribution SX.e when you invoice the final milestone for the last operation on the order. The lines are sent to lost business and no further processing is required. If another open operation is included on the backorder, another backorder is created and the invoice milestone process continues.

Note: Time and Material operations that are included on service orders are not eligible for invoice milestone billing. Transactions that are related to Time and Material operations are subject to standard invoice processing.

Feature activation

To use invoice milestone billing, Service Management must be activated in **SA Administrator Options-Integrations-Service Management**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service*.

Automatic creation of recurring payments for re-rent items

If you use the re-rent function in Service Management, you can now process recurring payments for re-rented items based on invoices from the vendor or for the customer. Use the new **Rental Invoice Source** field in **Vendor Setup** to indicate the workflow your company will use to create invoices, either **Accounts Payable** or **Accounts Receivable**. The value also applies to all ship froms for the vendor.

Both invoicing workflows use the rental contract number to associate the related purchase orders and invoices. The rental contract number and rental contract line number are now included in the PurchaseOrder BOD from Service Management. When Distribution SX.e consumes the BOD to create a purchase order, the values are used to associate the rental contract, purchase order, and purchase order line. Those associations are then used when processing the Invoice BOD or the SupplierInvoice BOD.

Accounts Payable workflow

If you select **Accounts Payable** as the **Rental Invoice Source**, you must process invoices provided by the vendor in **Vendor Invoice Center Entry**. You must process the initial invoice as a trade invoice, which is associated with the purchase order by the purchase order number. After you cost the trade invoice, the purchase order is closed and you cannot associate any additional vendor invoices with the purchase order. Subsequent invoices for the re-rented items are entered as expense invoices. Specify the rental contract number in new **Rental Contract** field on the **Invoice Detail** page to associate the payment with the purchase order and purchase order line. View information about invoices and purchase order lines with the same rental contract number on the new **Rental Contract** tab on the **Invoice Detail** page.

If the vendor sends invoices electronically, an invoice is created automatically in **Vendor Invoice Center Entry**. If the SupplierInvoice BOD includes a rental contract number and the purchase order to rent the item is in Received stage, then a trade invoice is created. If the purchase order is closed, then an expense invoice is created and the lines are totaled to calculate the amount of the expense invoice.

Account Receivable workflow

If you select **Accounts Receivable**, invoices are automatically created in **Vendor Invoice Center Entry**, based on customer invoice creation initiated in Service Management. To use this workflow, you must have an agreement with the vendor that you will submit your recurring rental payment without the vendor providing an invoice.

The vendor invoice is created when Distribution SX.e consumes the Invoice BOD that is sent when a rental contract invoice is generated in Service Management. For each line on the Invoice BOD with a rental contract number, the number is used to find the line for the re-rent item on the original purchase order. The cost per rental period is included on the original purchase order line. Total invoice amounts are used to create expense invoices for each vendor in **Vendor Invoice Center Entry**.

Caution: If you use the accounts receivable workflow, you must check-in all re-rented items on an order at the same time. If you attempt multiple check-ins, vendor invoices are not generated after the first check-in.

In support of this enhancement, rental contract values in the APEI, APET, and APSV tables are available for ad hoc reporting against the Data Lake. Rental contract numbers are displayed in **Purchase Order Inquiry**, **Vendor Inquiry**, and **GL Journal Inquiry**. Additionally, these reports were updated include information that are related to the enhancement:

- **Purchase Master List Report**

- **Vendor Master List Report**

Feature activation

Select the **Rental Functionality Active** option in **SA Administrative Options-Integrations-Service Management** to activate the rental contract functionality. The Accounts Payable workflow for invoicing a vendor is the default workflow and requires no activation. To activate the Accounts Receivable workflow, you must select **Accounts Receivable** in the **Rental Invoice Source** field in **Vendor Setup**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service*.

BOD updates create AR credits for rental contract orders

You can now process accounts receivable credits for rental contracts in Distribution SX.e using the **Invoices, Debit and Credit Memos** form in Service Management. Distribution SX.e consumes and processes rental contract credit information provided by Service Management through the Invoice BOD. The BOD is generated during invoice posting.

If the **Unit Price/Amount** field for a line item on the BOD contains a negative number, a return line is created on a stock order in **Sales Order Entry**. The order is then shipped and the order is invoiced using standard processing.

The credit given to the rental customer is applied against the rental contract itself and not against the product that was rented. Accounts payable invoice processing for re-rent products is not affected by this enhancement.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service*.

Rental contract freight charges now update sales order addons

Freight charges added to a rental contract in Service Management are now included on the Invoice BOD that is generated when a rental product is checked out or checked in. When the BOD is consumed by Distribution SX.e, the freight charge displays as an addon freight charge in **Sales Order Entry**.

The rental contract can be invoiced for the duration of the rental contract during check-out and check-in. The freight value is charged on the first invoice, which is usually created during rental check-out, and then set to zero.

If an additional freight charge must be applied to more than one invoice, the freight charge must be added to the rental contract again. The amount is included on the next invoice and again set to zero. Freight charges are not cumulative.

The **Freight** field was added to Service Management forms that are related to rental contracts in v2021.5 to meet taxing requirements and improve workflow. Previously, freight could only be added to a rental contract using the **Surcharge** field.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service*.

Infor Distribution Proof of Delivery CE

These new features or product improvements were made to support the integration to Infor Distribution Proof of Delivery Cloud Edition.

New features

These product improvements affect version 21.x of Infor Distribution Proof of Delivery CE.

Delivery images now stored in IDM

Signatures and images captured by your delivery driver and stored on the order data returned to the ERP are now stored in Infor Document Management.

Updates to order data, including links to any signature captures files in Proof of Delivery, were previously sent to the ERP in the Shipment BOD. With this new integration to IDM, prior to the Shipment BOD being submitted, signatures and images are updated to IDM. A unique identifier is assigned to each signature and to each image document. These identifiers are now stored on the Shipment BOD in the UserArea element. The associated sales order header is also updated with the ID, enabling you to view the images on the order in the ERP.

Use the Proof of Delivery Manager application to view signatures and images associated with a delivery and stored in IDM. The Delivery Images and Receiver Signature sections can be viewed on the **Delivery Detail** screen.

Two new document types are added to IDM to support these image files: POD_Signature and POD_Delivery_Image.

Note: You can include the signature image on invoices printed in Distribution SX.e as Format 4 forms (IDM or 3rd-party). You must create a custom Invoice template to include the signature image. See your ERP's CloudSuite Configuration Guide for information.

Infor Document Management integration

These new features or product improvements were made to support the integration to Infor Document Management.

Product improvements

These product improvements were made to support the integration to Infor Document Management.

Missing detail included on Statement form

Ship to detail including outstanding charges is now included on the Statement form if statements are printed in **Customer Entry Statement Print Report** as Print Format 4.

In addition, reference information is now included on the Statement form if you select **yes** for the **Print References** option. This prints any reference line that is attached to a transaction.

Adjusted printing of sales order subtotal lines

Sales order subtotal lines are now printed as separate lines, right-justified, on these Format 4 forms:

- Acknowledgment
- Delivery Note
- Invoice and Consolidated Invoice
- Pick Ticket
- Quote

The subtotal lines follow any comment lines. Previously, subtotal lines were included with the comment lines.

Note: The standard Infor Document Management templates for these forms have been updated and can be downloaded from the `IDM_SX_Content_11_21_5.zip` file attached to KB 1887404:

- SXAcknowledgementTemplate
- SXDeliveryNoteTemplate
- SXInvoiceTemplate
- SXConsolidatedInvoiceTemplate
- SXOEPickTicketTemplate
- SXQuoteTemplate

If you are using a custom version of any of these templates, you must apply the changes made to the XML output to your custom forms.

External comments printed correctly

Comments added to a sales order as external, stand-alone comment lines are now printed correctly on the Invoice and Pick Ticket Format 4 forms.

Note: If a stand-alone comment line is added as line 0, it is included in the header section of the XML output and is printed before Line 1 on the form.

The standard Infor Document Management templates for these forms have been updated and can be downloaded from the `IDM_SX_Content_11_21_5.zip` file attached to KB 1887404.

Pick ticket forms changed for picking and packing list

Separate output files are now created for pick tickets printed in Format 4 (IDM or third-party), depending upon the ship complete status of the order.

When you print a pick ticket in **Sales Entry Pick Tickets Report**, two pages are printed. The first is labeled "Pick Ticket" on the right corner of the form, and the second is labeled "Packing Slip".

On pick tickets where some lines may be backordered, the Format 4 "Pick Ticket" form includes only those lines that can be picked and does not include the shipping address.

When backordered lines are filled and the order is ship complete, and the pick ticket is printed again, only the lines still to be picked are included on one set of forms, and all lines are included on a second set of forms as a reprint. Two versions of both pages are printed, for a total of four pages:

- Page 1: "Pick Ticket" with only the lines to be picked printed on the form. No ship to address is included, and "Reprint" is printed in the top center of the form.
- Page 2: "Packing Slip" with only the lines to be packed printed on the form. No ship to address is included, and "Reprint" is printed in the top center of the form.
- Page 3: "Pick Ticket" with all lines from order printed on the form. The ship to address is included. "Packing Slip" is printed in the top center of the form.
- Page 4: "Packing Slip" with all lines from order printed on the form. The ship to address is included. "Packing Slip" is printed in the top center of the form.

If an order has no backordered lines and all lines can be shipped, two versions of the pick ticket and packing slip forms are created as described in the bullets above.

The standard SXOEPickTicket template is updated with these label changes and can be downloaded in the IDM_SX_Content_11_21_4.zip file attached to KB article 1887404.

Note: If you have custom pick ticket forms, you must add the Packing Slip label to your forms manually. See KB 2190215 for instructions for customizing your OE pick tickets.

Infor Rhythm for Commerce integration

These new features or product improvements were made to support the integration to Infor Rhythm.

Product improvements

These product improvements were made to support the integration to Infor Rhythm.

Pricing API call processing time improved

The processing time for handling the Rhythm PricingServices call when it is received in Distribution SX.e is improved. This call is initiated by Rhythm for Commerce when inquiring on prices for multiple products in Distribution SX.e where no warehouse is specified.

Values added to inbound SalesOrder BOD for Rhythm integration

New fields are received in the SalesOrderHeader section of the inbound Process SalesOrder BOD: **Placed By** and **Reference**.

The **Placed By** value is received in the inbound Process SalesOrder BOD as a part of the order header note section. For the Rhythm for Commerce integration, this will store the email address of the user who created the order in Rhythm. The **Placed By** email is displayed in **Sales Order Inquiry-Totals** in Distribution SX.e. It is also displayed in the **Order Global Note** view in the Notes context application.

The **Reference** field is now populated in the SalesOrder BOD with the **Your Reference** value in Rhythm. This field, combined with the source order number (purchase order #), updates the **Reference** field on the sales order header. It can be viewed in the **Reference** field in **Sales Order Inquiry-Header** in the Reference & Other Information section in this format: [**Reference**]; **ION**: [**source order #**].

ION integration

These new features or product improvements were made to support the integration to ION.

Product improvements

These product improvements were made to support the integration to ION.

Employer Reference element updated in ContactMaster BOD

The element, EmployerReference, is now updated when a contact record is associated with a **Customer Ship To Setup** record. The EmployerReference tag references the **Customer Ship To Setup** record associated with the contact role.

The EmployerReference element is generally used by CRM applications for account lookup.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

Product improvements

These product improvements affect multiple functions in the application.

Hot key improvements increase usability

The performance of hot keys that are applied to complex screens through the Extension Enablement Toolkit was improved to ensure consistent behavior and increase usability. Previous issues, such as focus and application per page, were resolved.

Your system administrators can create hot keys to navigate modals and screens with multiple tabs and views, such as **Sales Order Inquiry** or **Vendor Invoice Center Entry**, to improve workflow. Hot keys can also be used to perform button functions, such as opening a new or existing record.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

Product

These new features or product improvements were made to the Product module.

Product improvements

These product improvements were made to the Product module.

Product List added to Product Warehouse Product Setup

The **Product List** option is now available in **Product Warehouse Product Setup**. You can select a product in the grid and select **Product List > Add To Product List** or **Create New**. This mirrors the same capability that already exists in **Product Setup**.

Product lists are created as a quick shopping list of items that are frequently ordered together in **Sales Order Entry**. They are created in **Product List Setup** or with the **Product List** option in **Product Setup** or, with this enhancement, in **Product Warehouse Product Setup**.

Purchase

These new features or product improvements were added to the Purchase module.

Product improvements

These product improvements were added to the Purchase module.

Catalog vendor product number printed on non-stock purchase orders

You can now print vendor products from **Product Catalog Setup** on nonstock purchase order lines in the **Purchase Entry Processing Print POs Report** and **Purchase Demand Print Report**. When you select **No** in the **Print Our Product Number?** option and the line is for a nonstock catalog product, the vendor product number is printed if a record exists. If a vendor product is not set up in **Product Catalog Setup**, the product from **Purchase Order Entry** is printed.

Improved product value logic for purchase order Excel spreadsheet import

When you format an Excel spreadsheet to import and create an order in **Purchase Order Entry**, a product value is required for each line item. You may include values in the **Vendor Product** and **Distributor Product** columns for the line item. The **Distributor Product** value takes precedence and is used, even if both values are imported.

To prevent the **Distributor Product** value from being replaced, the cross-reference logic for vendor products that was previously applied to the **Distributor Product** column has been removed. Now, the Vendor Product cross-reference logic is only applied to the **Vendor Product** column. When you import only a **Vendor Product** value in the line item, the value is used to determine the **Distributor Product** value, based on **Product Extended Product Cross Reference Setup-Vendor** and **Product Warehouse Product Setup**.

Sales

These new features or product improvements were made to the Sales module.

Product improvements

These product improvements were made to the Sales module.

New AO option allows for whole order discount greater than order amount

A new option, **Allow Whole Order Discount Greater Than Shipped**, is added to **SA Administrator Options-Documents-Sales Orders-Entry Settings**. When this option is selected, you are able to enter a whole order discount on an order in **Sales Order Entry** when the line total of the order is zero. If the discount makes the order total negative, a Miscellaneous Credit is created during **Sales Entry Invoice Processing Report**.

If the option is not selected, the whole order discount cannot exceed the shipped line total on the current order suffix. If the shipped quantity is zero, such as for a Quote Order or backordered amount, the whole order discount cannot exceed the total line amount. The message `Whole Order Discount Greater Than Invoice Amount (5904)` is displayed.

When selected, this option applies to whole order discount amounts only, not whole order discounts applied as a percent of the order. The whole order discount is applied to the -00 suffix and is not rolled to a backorder.

Note: This feature restores functionality that was previously available in Distribution SX.e, but adds the Administrator Options control for enablement in your company.

System Administrator

These new features or product improvements were made to the System Administrator module.

New features

These new features were added to the System Administrator module.

Improvements to batch call processing

Batch call processing was originally implemented in the January 2021 update (11.21.1) for processing large transaction sets in **Customer Cash Receipt Entry** in a batch process to avoid time-out errors. Since then, it has been made available for several other transaction processing and inquiry functions in Distribution SX.e. In the May 2021 version, these improvements are added:

- Option is relabeled to more clearly define its use
- Individual service call selection enabled from a scrolling list
- Orphan batch process records are now purged
- Improved logging of batch processes
- New business rule can be enabled to control time between polling

The original option, **Use Batch Call Process for Designated Slow Service Interface Calls**, in **SA Administrator Options-System-General** is relabeled **Use Advanced Polling Interface Logic for Designated Service Interface Calls**.

The option is enhanced to enable these new capabilities:

- New selection list

The existing option is updated to include a scrolling selection list of all service calls that are enabled for batch call processing. The new **Available Advanced Polling Calls** list currently includes service calls for **Customer Cash Receipt Entry**, **Sales Order Inquiry**, **Sales Order Entry**, **Purchase Receipt of Inventory Entry**, **Transfer Receipt of Inventory Entry**, and **Transfer Shipping Entry**.

If the **Use Advanced Polling Interface Logic for Designated Service Interface Calls** option is selected, and no calls are selected in the list, batch processing is enabled for all calls. This ensures that the option is fully activated if you had enabled the option in a prior update.

If the option is selected, and you select any calls in the list, batch processing is enabled for the selected calls only.

If the option is not selected, batch call processing is not enabled for any service calls. If you uncheck the option after selecting service calls in the list, those calls remain selected. This is useful for disabling batch call processing temporarily. The selected calls remain selected if you enable the option at a later date.

- **Purging records**
The existing rdclean utility is used to review any orphaned batch process records that remain in the database more than two days after the process is completed. Rdclean removes any batch call records that remain with a transaction date two days older than the current date.
- **Logging**
Log records, labeled `batchcallprocess`, are now added to the `rptsch.mmddyyy.log` file and can be used for debugging, if necessary.
- **Business rule**
A new business rule, `RequestPollingInterval`, can be configured in **SA Business Rule Setup** to override the 5-second interval between polling the batch process to determine if it has completed. You can set a shorter interval to require the poller to check the batch process sooner than 5 seconds. This is useful if a service call normally can complete in a short amount of time, under the 5-second polling time. If the business rule is enabled for a time under 5 seconds, and you run a process where a large set of data is processed, the batch process is run more frequently, but you do not experience the timeout issues.

Infor shall continue to review other transaction processing service calls in Distribution SX.e to determine where the batch process would reduce time-out issues for large transaction sets. We recommend you review the **Available Advanced Polling Calls** list periodically or as part of troubleshooting transaction set time-out errors.

Feature activation

To activate this feature, you must enable batch call processing by selecting the **Use Advanced Polling Interface Logic for Designated Service Interface Calls** option in **SA Administrator Options-System-General**. If you enabled this option previously, review the list of service calls in the **Available Advanced Polling Calls** list to select the specific calls to enable for batch processing. If you do not select specific calls, all calls are enabled.

To enable the business rule, select the `RequestPollingInterval` attribute for a Config category and Configuration Setting rule type in **SA Business Rule Setup**. Specify the number of seconds in the **Rule Value** field. To inactivate this business rule and use the standard 5-second interval, specify `0` in the **Rule Value**.

Important: Batch call processing, when activated, may impact your system response time. We recommend you review each service call enabled for batch processing and activate only the calls that currently experience time-out issues.

Product improvements

These product improvements were made to the System Administrator module.

Report Ranges and Options grid customization enabled

You can now clear or reorder Ranges and Options grid records in **SA Administrator Options-System-Report Items**. This feature is helpful for operators who develop custom reports or add custom options to existing reports.

Note: The standard report ranges and options controlled by Distribution SX.e development metadata are overwritten with each release. A custom report should be set up as **site specific** in the **Standard** field in **SA Administrator Options-System-Report Items** so its custom ranges and options are not overwritten.

Importing data from different tenant supported

You can now export data from a source environment from one tenant and then import it into a target environment for a different tenant. This improvement is intended for use by Infor Partners that export 'clean' data from their tenant into a customer tenant for testing.

Before you export the data using the **SA Tenant Refresh - Data Export Report**, you must set up a new business rule in **SA Business Rule Setup**. The business rule is a non-directional global rule that contains these values:

- Document Handler: config
- Node Name: TenantRefresh
- Attribute Name: PartnerExport
- Rule Value: Name of the tenant that will import the data

After the data is successfully exported, the **Rule Value** field for the business rule is cleared. You can then run the **SA Tenant Refresh - Data Import Report** in the target environment.

If you use the business rule, note these differences from the standard tenant refresh process:

- The 28-day limit on data refreshes is not enforced if a business rule is set up for a target tenant.
- If data is successfully imported into a production environment (<tenant>_PRD), then a record is written to the database to indicate that the import was completed. This record prevents duplicate imports from the same source tenant. If the **SA Tenant Refresh - Data Import Report** is run for the same source tenant, then this error is displayed on the report output: `PRD tenant already imported on: <date>`. After the original import, you cannot run the report again unless the record is manually removed from the database. You must contact Infor Support about record removal.

See the *Infor CloudSuite Distribution Configuration Guide*.

Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake:

- arsrv
- edsbwc
- icsou
- icspe
- icsv
- icswb
- oeehextra
- wmet
- wmsb
- wmsbp

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

New features

These new features were added to the TWL module.

Reprint pick label functionality and additional fields added to lot entry

These enhancements were made to TWL to improve lot processing and to enable the reprinting of pick labels:

Reprinting pick labels

If a label is lost or requires updates, you can now reprint or make updates to the pick label.

A new menu option, **Reprint Picking Lbl**, is added to the **Order Picking Main Menu**, **Pick Selection** and **Order Picking** windows in TWL. Select this option to reprint or make updates to pick labels without needing to access a Distribution SX.e terminal.

Additional fields added to lot entry

Several new data fields are added to **Product Extended Lot Number Setup** and **Purchase Receipt of Inventory Entry** in Distribution SX.e:

- **Country of Origin:** The country in which the lot was manufactured, produced or grown.
- **Case Quantity:** The quantity in each case for the specific lot. The case quantity for a product may vary based on the vendor.
- **Mfg Lot #:** The lot number from the manufacturer. This may be different than the lot number assigned by the distributor.

After lot data records are updated in **Purchase Receipt of Inventory Entry** these events occur:

- **TWL Stock Adjustment** data is passed to Distribution SX.e through the **WL Entry Batch Adjust Inventory Report**, which either creates a new **Product Extended Lot Number Setup** record or adjusts existing **Product Extended Lot Number Setup** records as needed.
- **TWL Initial Data Load** data is passed to Distribution SX.e, which either creates a new **Product Extended Lot Number Setup** record or adjusts existing **Product Extended Lot Number Setup** records as needed.
- **TWL Cycle Counting** data is passed to Distribution SX.e, which creates a new **Product Extended Lot Number Setup** record or adjusts existing **Product Extended Lot Number Setup** records as needed.

The data is printed on product and shipment labels so it can be identified both in the warehouse and at the job site.

The pick label reprinting functionality and the additional lot entry fields are applied to both TWL and TWL RF.

Feature activation

Review these new TWL system parameters to activate the new data added to lot products:

- 7511-Assign Country to Lots: added to activate the functionality of assigning the country in which the lot was manufactured. The parameter defaults as cleared.
- 7512-Assign Mfg# to Lots: added to activate the functionality of assigning the lot number from the manufacturer. The parameter defaults as cleared.
- 7513-Assign Case Quantity to Lots: added to activate the functionality of assigning the case quantity for specific lots. The parameter defaults as cleared.

Note: If updates to existing labels are required, you can make updates using **Product Extended Lot Number Setup** data in the **Barcode Label Designer** in Enterprise Printing Platform (previously Unibar).

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Picking, Packing, Shipping, and Kitting* and *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics*.

Transfer

These new features or product improvements were made to the Transfer module.

Product improvements

These product improvements were made to the Transfers module.

Batch call process enabled for transfer shipping and receiving

Batch call processing is now enabled for Final Update in **Transfer Shipping Entry** and **Transfer Receipt of Inventory Entry**. It is also enabled for auto receiving in **Transfer Shipping Entry**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select these service interface calls from the **Available Advanced Polling Calls** list:

- **WTEI - wteiupdatefinal**
- **WTES - wtesfinalupdate**

This initiates a batch process when you select **Final Update** in these functions, or when you select **Ship All; Auto Receive WTs** in **Transfer Shipping Entry**. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the Final Update and Auto Receive functions to complete without timeout errors.

Value Add

These new features or product improvements were made to the Value Add module.

Product improvements

These product improvements were made to the Value Add module.

Improved VA Shipping Entry prompts for short-shipped order sections

VA Shipping Entry functionality has been improved to ensure that you are notified when a Value Add (VA) order section is short-shipped. Additionally, a new administrator option setting can be set to prevent short-shipping VA orders. In **SA Administrator Options-Documents-Value Add-Entry Settings**, the **Auto Create Section BO in Shipping** field is renamed to **Default Action for Short Shipped Sections**. You can select one of these options from the field:

- **Auto Create Back Order**
- **Always Prompt**
- **Do Not Allow**

The **Do Not Allow** option is new. Select it when you want to always prevent short-shipping VA orders.

When the **Always Prompt** option is selected, a warning is displayed in **VA Shipping Entry** when you specify a shipped quantity that is less than the ordered quantity. You can choose to cancel the action, proceed with the short-ship order, or create a back order. The option to create a back order is available when you select the **Allow Section Back Order** option in **VA Shipping Entry**.

Note: Use caution when proceeding with a short-shipped order in **VA Shipping Entry**. You will receive an error during **VA Receipt of Inventory Entry** and must reduce the quantity received to match the actual amount shipped.

Vendor

These new features or product improvements were made to the Vendor module.

Product improvements

These product improvements were made to the Vendor module.

Enhancements to Vendor Cash Requirements Report

Several enhancements were made to the **Vendor Cash Requirements Report** to provide greater flexibility in creating report output. These enhancements include:

- **Additional report output formats**
A new option allows you to send the report to CSV file, Email, Dropbox, or ION when **Detail** is selected in the **(D)etail, (V)endor Totals, or (S)ummary** report option. **Email** sends the CSV output as an email attachment. Use the **Dropbox** selection to generate the report in CSV format and upload to your Dropbox account. Selecting **ION** generates output using the existing AnyDocument BOD.
- **New options**
New options were added to include a CSV file name or email address. If you select CSV file output, you can specify the file name in the new **CSV File Name** option. If you select Email output, you can specify the email address to whom the CSV file is to be sent.

If you generate ION output, you can use **SA ION Inbox/Outbox Inquiry** to verify the AnyDocument BOD is sent to ION. The AnyDocument BOD is already in use, and the lookup already contains the BOD as a choice.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 9: April 2021 Production Update

This section describes the details of the April 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **April 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

Distribution Analytics for Birst

These new features or product improvements were made to the Distribution Analytics content for Infor Birst.

Product improvements

These product improvements were made to the Distribution Analytics Content for Birst.

New GL Reset Account Maps workflow available

A new CSD GL Reset Account Maps workflow is available to run manually in case of data discrepancies in the General Ledger (GL) Birst space after it has been reconfigured. You can use this workflow to reset the GL hierarchy and accounting maps and delete any elements that exist in the already processed maps.

Feature activation

The workflow is included in the Infor Distribution Analytics content provisioned for your tenant by Infor Cloud Operations, but it must be run manually. We recommend you contact your Infor Consultant before resetting your GL hierarchy and accounting maps.

See the *Infor CloudSuite Distribution Configuration Guide*.

EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

Product improvements

These product improvements were made to support EDI documents.

Stored reports used for rebate processing

You can now create stored **EDI Entry Processing Rebates Reports** with different default options, and then use business rules to apply them at the vendor, company, or global level. When an inbound SyncSXVendorRebateClaim BOD is received, this business rule hierarchy is used to determine which stored report is used for processing:

- Vendor
- Company
- Global
- Standard stored report

If you do not set up stored reports, the standard report with the standard default values is used.

After the transaction is processed, the informational messages are displayed in the **Electronic Transaction Control Center** (ETCC). The messages show which stored report was used to process the transaction and the default value for each report option on the stored report. The information messages are retained until you delete them.

To establish rebate processing parameters, set up stored reports in **EDI Entry Processing Rebates Report**. At a minimum, we recommend that you create a standard stored report that is named @edepr. Ensure that the default values for the report options address the majority of your processing requirements. Then, set up the business rules to indicate which report applies to a vendor or company, or the system. If a business rule template is not available for default rebate processing parameters, you must set it up in **SA Table Code Value Setup**.

See the *Infor Distribution SX.e Setup and Administration Guide for EDI*.

Enterprise Printing Platform integration

These new features or product improvements were made to support the integration to Enterprise Printing Platform.

Product improvements

These product improvements were made to the Enterprise Printing Platform integration.

Label reports updated to support integration

These changes were made to the label reports in support of the Enterprise Printing Platform integration:

- Only these label files, which are compatible with the Label Designer in Enterprise Printing Platform, are now retrieved when you run the **SA Default Label Retrieval Report**.
 - `zeb*.lbl` for Total Warehouse Logistics
 - `*zb9*.lbl` for Integrated Barcode
- Enterprise Printing Platform is now referenced in the report output for the **SA Default Label Retrieval Report** and the **SA Label Configuration Review Report**, replacing references to Unibar ELS Enterprise.
- Options 2 and 3 on the **SA Default Label Retrieval Report** were renamed to **SXe EPP Default Labels** and **SXe EPP Default Labels**.

Additionally, the description of System Parameter 1019 in **TWL Administration-System Parameters** was updated to remove a reference to Unibar.

Infor CloudSuite Field Service integration

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service.

New features

These new features were added to support the integration to Infor CloudSuite Field Service.

Creation of assembly SROs now supported

You can now create sales orders for assembly products in **Sales Order Entry**, and then run a report to generate corresponding assembly SROs in Service Management. Synchronization is maintained between the documents when you edit the assembly SROs and post transactions in Service Management. Other processing, such as picking, shipping, and invoicing, is performed in Distribution SX.e.

An assembly product is a primary product that is assembled with components, such as options and accessories, that are based on customer specifications. Assembly components can be stocked, catalog, and nonstock products. Assembly components can also be labor products that represent work codes or miscellaneous codes from Service Management.

Assembly products are defined using templates that are set up in Service Management. A template can include all or some of the planned material, planned labor, and planned miscellaneous items for an assembly product.

The assembly product and its template are required on a sales order, but the assembly components that you add to a sales order depends on your use of templates.

Assembly components are associated with an assembly product in **Sales Order Entry**. You can enter an assembly product and its associated assembly components on a stock order, direct order, or a quote. If you create a quote, you must convert it to a stock order or direct order for processing. When you finish the sales order, the Tag & Hold disposition is automatically applied to prevent backorders and shipment. You can edit the sales order until you create the assembly SRO in Service Management.

A new report, **Sales Entry Generate Service Orders for Assembly Report**, is run to create the assembly SROs in Service Management. The report indicates if the assembly product was successfully added to an assembly SRO. If an error occurred, you can correct the error and then re-run the report.

When an assembly SRO is successfully created in Service Management, these events occur in Service Management:

- Planned material, planned labor, and planned miscellaneous items are added to the assembly SRO, based on the line items on the sales order. The standard assembly components from the template are also added to the assembly SRO. The sales order number is annotated and the **Assembly Ready for Service** option is selected.
- A ServiceOrder BOD is sent to Distribution SX.e to update the sales order with any assembly components from the template that were not included on the sales order. After the sales order is updated, you cannot edit the sales order unless you are granted authority for the Change Assembly SRO Sales Orders authorization point. If you edit a sales order after the assembly SRO is created, you must manually update the assembly SRO to maintain synchronization between the documents.

When work begins on the assembly SRO in Service Management, a ServiceOrder BOD is generated each time the service technician performs an edit or posts a transaction. When the service technician closes the assembly SRO, the ServiceOrder BOD is sent and the Tag & Hold disposition is removed from the sales order. You can then continue to process the sales order in Distribution SX.e.

To pick products for sales orders with assembly products, you can run the **Sales Entry Pick Tickets Report** or use Total Warehouse Logistics. You can also use the standard processes or Total Warehouse Logistics for packing, shipping, and invoicing.

Feature activation

Service Management must be activated in **SA Administrator Options-Integrations-Service Management**. To implement the assembly SRO process, specify the Service Management V2 API URL in **SA Administrator Options-Integrations-Service Management**. The URL is required for the new `APIGetSROTemplates` and `APICreateSROFromExternalOrder` calls that are used in the assembly SRO process.

You must also set up the Level 5 functional security in **SA Operator Setup** for operators who will run the **Sales Entry Generate Service Orders for Assembly Report**. The function acronym for the report is OERAO.

You can identify assembly products and the associated template for assembly products in **Product Setup**. This setup is not required because you can identify assembly products and the associated template at the line level in **Sales Order Entry**.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service*.

Direct orders supported for sourced products

Direct purchase order and warehouse transfers ties to source planned material transactions for stock and nonstock items on service orders are now supported. If the **Direct Ship** option on the **SX.e Non-Stock Query** or **SX.e Material Availability** form in Service Management is selected, a tied sourcing document is created when a sales order is created in Distribution SX.e. The ship to and ship to address on the tied sourcing document reflects the customer or customer ship to address, not the address of the ordering warehouse.

The **DropShipIndicator** element was added to the ServiceMasterGroup section in the ServiceOrder BOD to support this enhancement. Valid values for the field are true or false.

When a tied source document is processed in **Purchase Receipt of Inventory Entry** or **Transfer Receipt of Inventory Entry** in Distribution SX.e, the ReceiveDelivery BOD is sent to Service Management to update the service order. The ReceiveDelivery BOD will include the value **Direct order** in the **Description** field in the header.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service*.

Infor Distribution Storeroom CE

These new features or product improvements were made to Infor Distribution Storeroom Cloud Edition.

New features

These new features were added to Infor Distribution Storeroom CE.

Vending machine integration supported

You can now integrate Storeroom with a third-party vending machine application to automatically create issues. The integration uses ION API to consume REST Storeroom API service calls. The vending machine application must be able to send JSON files to the web service.

JSON files containing data for one or more issues are sent from the vending machine to the REST service target location, `/vendingMachine/file`. The data is validated against fields in the Storeroom database. If the data passes validation, the issue is automatically created in Storeroom. If the data does not pass validation, you must manually correct and submit the issue in the Storeroom Import function.

Feature activation

You must set up a backend service account for the vending machine application in ION API and download credentials. You must associate the service account with an Infor Ming.le user that is assigned at least one Storeroom security role other than SM.StoreroomMobile. You must also configure the vending machine application to invoke the web service.

See the *Infor CloudSuite Distribution Integration Guide for Infor Distribution Storeroom CE*.

Operating system requirements for Storeroom Mobile updated

These operating systems versions are now required to support Storeroom Mobile 11.21.4:

- Android 5.1
- iOS 11.0

The changes to Storeroom Mobile to support iOS v11.0 impact how local data is stored on the mobile device. If you use iOS, local data that is stored in existing instances of the mobile app is not retained when the app is updated to the 11.21.4 release. This data is affected:

- Drafts
- Server settings
- User settings
- Most recently used (MRU) values in lookups

Before the 11.21.4 update, we recommend that you submit drafts for issues, returns, and other documents.

Important: If you disable the App Updates settings on your iOS device, you will receive notification when the update for Storeroom Mobile v11.21.4 is available, but it will not install automatically. You can then install the update manually after you have submitted the drafts and are prepared to reconfigure the server and user settings. If the App Updates setting is enabled, the update for Storeroom Mobile v11.21.4 will automatically install after the 11.21.4 release becomes available on April 17.

After the update, you must re-enter your server settings and user settings. See information about submitting drafts and resetting the server and user settings in the *Infor Distribution Storeroom Mobile User Guide*.

Infor Go

These new features or product improvements were made to support enablement of Infor Go.

New features

These new features were added to support the enablement of Infor Go.

CloudSuite Distribution enabled for Infor Go

CloudSuite Distribution is now enabled for Infor Go. Infor Go is a mobile application that provides a synchronized mobile experience for multi-tenant cloud customers. Using Infor Go, you can access Infor applications and your Infor Ming.le profile on an iOS or Android tablet.

Important: Credit card handling with the CenPOS application integration is currently not supported when running CloudSuite Distribution within Infor Go.

Feature activation

Infor Go runs on iPhone, iPad, and other iOS devices with iOS version 12.x or 13.x. Download the Infor Go application for iOS from the Apple App Store.

Infor Go also runs on Samsung, Google, and other devices running Android version 9 or 10.

Note: CloudSuite Distribution is enabled for tablet devices only.

For instructions for installing and using Infor Go, refer to these documents:

- *Infor Go User Guide for Android*
- *Infor Go User Guide for iOS*
- *Infor Go Administration Guide*

Miscellaneous

These new features or product improvements affect multiple functions in the application.

New features

These new features affect multiple functions in the application.

User control of collapsible areas implemented

To accommodate your workflow, you can now control the default state of most collapsible sections and panels in Distribution SX.e.

Collapse/expand control of sections supported by Personalization

You can now personalize the default state of sections on a page. You can collapse or expand a section, based on your workflow, to improve usability. Depending on the default state, you can then use the [Show More](#) and [Show Less](#) controls to expand or collapse a section. Examples include the Advanced Search that is available in most inquiry functions and the Extended Fields section on the **Advance Line Entry** page in **Sales Order Entry**.

If certain conditions must be met before a section is available for expansion, you cannot personalize it. This message is displayed on the **Edit Control** window: This control has collapse logic that cannot be changed.

See the *Infor Distribution SX.e User Guide*.

Collapse/expand control of panels and sections based on your previous user session

The state of each panel and each section within a panel in Distribution SX.e is now retained in your browser's local storage from session to session. It is retained per machine, based on your operator, company, and tenant. Panels are controlled by menu function. Sections are controlled individually within each menu function. You can use this feature to close the panels and sections that you do not use regularly to streamline the

appearance of your UI. Most panels and sections are open by default until you collapse them, but these exceptions apply:

- Panels are collapsed by default if they do not contain information.
- Most sections on the **Developer** editing pages are collapsed by default.
- Panels are collapsed by default when you use the Compare tool in **SA Extension Administration**.
- The panel with the Search In and Refine sections on the **Global Search** page is expanded or collapsed based on your search activities.

Note: This improvement does not include the **Context App** panel in Infor Ming.le.

User interface readability improved

In all applicable functions, the static data in information fields is now displayed in bold font. This change was implemented to improve readability on pages with numerous information fields. Examples include the **Header** tab in **Sales Order Inquiry** and the **Invoice Detail** page in **Vendor Invoice Center Entry**.

This change can be modified using the Extension Enablement Toolkit. The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

Product improvements

These product improvements affect multiple functions in the application.

Modified controls identified in Personalization

On the **Personalization** page, you can now use one of these methods to identify the controls that were modified:

- **Highlight the changes**
Select **More Actions > Highlight Changes** to highlight the modified controls with an orange border. You must access the **Edit Control** window for the control to view the changes. A control is not highlighted if it was moved, but not otherwise edited.
See the *Infor Distribution SX.e User Guide*.
- **Review the JSON values**
JSON values that show the control modifications are available at the control and page levels. To view the JSON values for a control, click the action icon for the modified control and then select **Show Changes**. To view the JSON values for the page, select **More Actions > Show JSON**.
Note: The JSON values are intended for use by developers only.

If you personalize at the User level, only your modifications are shown. If you personalize at the Profile or Company level, modifications made by you and other users are shown. Personalization records are also maintained in **SA Personalization Administration**.

Product

These new features or product improvements were made to the Product module.

Product improvements

These product improvements were made to the Product module.

Record limit search field added to Product Extended Product Cross Reference Setup

A **Record Limit** field is added to the **Search** pane in **Product Extended Product Cross Reference Setup**. You can use this field to specify the maximum number of records returned when performing an inquiry for reference, customer, and vendor product cross-references.

The default record limit is set as a business rule in **SA Business Rule Setup**. You can clear the **Record Limit** field before your search to return all records within your search parameters.

New option displays last suffix for dummy core master transaction

A new option is added to **Product Adjust Core Master Entry** to show the last suffix found for a Miscellaneous Order for a blank or 0 document. This is useful if you are creating a dummy master record and need to avoid entering a duplicate suffix when adding another suffix. The option, **Last Order Suffix**, is displayed next to the **Document #**. Also, a new **Next Line #** option is added that displays the next available line for the selected Misc Order and suffix.

Purchase

These new features or product improvements were added to the Purchase module.

New features

These new features were added to the Purchase module.

Batch call processing enabled for Purchase Receipt of Inventory Entry

Batch call processing is now available for **Purchase Receipt of Inventory Entry**.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, a batch process is initiated when you run Final Update for a purchase order or

multiple POs with a large number of lines. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the Final Update function to complete without timeout errors.

Batch call processing is available for these functions only at this time:

- **Customer Cash Receipt Entry**
- **Sales Order Entry-Copy**
- **Sales Order Entry-Sourcing** to a VA order
- **Sales Order Inquiry**
- **Purchase Receipt of Inventory Entry**

Sales

These new features or product improvements were made to the Sales module.

New features

These new features were added to the Sales module.

Sales Order Inquiry usability improved

To improve usability and efficiency, these changes were made to **Sales Order Inquiry**:

- Direct access to **Sales Order Entry** from the main inquiry page and the order detail page
New, Maintain, Cancel, Copy, and Print buttons are now available. Click **New** to open **Sales Order Entry** to enter a new order. Click one of the other buttons to open the selected order in **Sales Order Entry** in the corresponding mode.
The operator security that is required to perform the actions directly in **Sales Order Entry** is honored in **Sales Order Inquiry**. For example, if you do not have the security to create a new order in **Sales Order Entry**, the **New** button is not available in **Sales Order Inquiry**.
- Customer parameters honored in the **Product** field in the Advanced Search
If these conditions are met, the products that are available in the **Product** lookup are determined by customer values:
 - You specify a customer in the Advanced Search before you access the **Product** field.
 - Customer cross-reference records are set up in **Product Extended Product Cross Reference Setup**.
- Multiple value selection supported in the **Line Type** field in the Advanced Search
You can now select one or more of these values: **Select All, Special, Non-Stock, Lost Business, and Stock**. If you do not select a value, then all values are used in the search. If you select one or more values but not all values, then the **Display** field is disabled with the default value of **Line Detail**.
- Line Type column in the Orders grid on the main inquiry page is updated

The **Non-Stock** column was relabeled as **Line Type**. The description of the line type is now displayed in the column, for example, **Stock**, **Special**, **Nonstock**, or **Lost business**. Previously, the column was blank if the line type was stock, or a code was displayed for the other line types.

- Stage column in the Orders grid on the main inquiry page is sorted by description
When you sort the Stage column in ascending or descending order, the orders are now sorted alphabetically, based on the value in the column. Previously, the column was sorted based on the numerical value that is assigned to the stage.
- Columns in the Orders grid on the main inquiry page were added or updated
The format of the Orders grid depends on the values included in the search. Separate formats accommodate header, line, component, or core information. For this enhancement, columns were added or updated for the header, line, and component formats.

These columns were added to the header format:

- Inside Sales Rep Name: This value corresponds to the initials in the Inside Sales Rep column.
- Outside Sales Rep Name: This value corresponds to the initials in the Outside Sales Rep column.
- Taken By Name: This value corresponds to the operator initials in the Taken By column.

These columns were added to the line format:

- Price: If you cannot view prices, based on the **Price/Discount Info** setting in **SA Operator Setup**, then the column is blank. If you conduct a search for kit components, this column is not displayed.
- Special Cost: This value is the special price cost per unit.
- Taken By Name: This value corresponds to the operator initials in the Taken By column.
- Extended Description: You must add this column to grid using Personalization. If the extended description is not shown in its entirety within the column, an ellipsis (...) is displayed. Hold your mouse over the description to view additional information.

These columns were added to the component format:

- Component Type: This column is displayed only if you conduct a search for all orders and kit components. Valid values include kit or tally.
- Component Line Type: This column is displayed only if you conduct a search for kit components. Valid values include stock, nonstock, special, and lost business.
- Component Extended Description: You must add this column to the grid using Personalization. This column is displayed only if the search includes kit components. If the extended description is not shown in its entirety within the column, an ellipsis (...) is displayed. Hold your mouse over the description to view additional information.

The **Price/Discount Info** setting in **SA Operator Setup** is now honored in these columns in the line format: Net Ordered Amount and Net Shipped Amount. If your operator security prevents you from viewing prices, then the column is blank.

Note: If you conduct a search for kit components, the columns are not displayed.

- Order Rep and Order Rep Percent values were added to these pages:
 - Order Controls section on the **Header** tab on the order detail page
 - General section on the **Extended** tab of the line detail page

Note: The values are also now available on the same page in **Sales Credit Release Inquiry**.

See [User control of collapsible areas implemented](#) on page 142.

Batch call processing enabled for VA sourcing in Sales Order Entry

Batch call processing is now available for **Sales Order Entry-Sourcing** when tying an order to a VA order with a large number of inventory lines.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, a batch process is initiated when you tie a sales order to a Value Add order with a large number of inventory lines, either in a single section or multiple sections. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the addition of the line from the VA order to complete without timeout errors.

Additionally, an internal change to Progress settings is also implemented to improve performance in the process.

Note: Batch call processing is available for these functions only at this time:

- **Customer Cash Receipt Entry**
- **Sales Order Entry-Copy**
- **Sales Order Entry-Sourcing** to a VA order
- **Sales Order Inquiry**
- **Purchase Receipt of Inventory Entry**

Batch call processing enabled for Sales Order Inquiry

Batch call processing is now available for **Sales Order Inquiry**.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, a batch process is initiated when you inquire on a sales order with a large number of lines. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the inquiry function to return your search results against large record sets without timeout errors.

Batch call processing is available for these functions only at this time:

- **Customer Cash Receipt Entry**
- **Sales Order Entry-Copy**
- **Sales Order Entry-Sourcing** to a VA order
- **Sales Order Inquiry**
- **Purchase Receipt of Inventory Entry**

Product improvements

These product improvements were made to the Sales module.

Operational hold codes created for system-defined hold codes

When you activate operational hold codes, operational hold code values for these system-defined hold codes are now created in **SA Table Code Value Setup**:

- e: API/EDI hold, or e-hold
- h: Credit hold
- w: Service Warranty hold

Previously, only the user-defined legacy hold codes were converted into operational hold code values in **SA Table Code Value Setup**. Operational hold codes are activated by selecting **Use Operation Hold Codes** in **SA Administrator Options-Documents-Sales Orders-Entry Settings**.

Shipped quantity set to zero for tied work orders in Order Fulfillment

These changes were made to the order fulfillment process:

- The shipped quantity for sourced Value Add and kit products on the stock orders that are created after you submit the fulfillment order is now set to zero. Previously, the shipped quantity reflected the quantity that was available in the warehouse on the stock order, which caused the sourcing document to be ignored.
You can include fabricated products on fulfillment orders, but you must source them manually. Use your standard workflows to process the fabricated products and update the tied stock orders. Because warehouse lists are not created for fabricated products, you cannot select a source for a fabricated product using the order fulfillment process in **Sales Order Entry**.
- The **Blanket Order** window with the lump sum billing settings no longer opens when you maintain an existing fulfillment order.

Notes can be added to a shipping request

You can now add a note to a shipping request in **Sales Shipping Request Entry**. Notes are added in the Notes context application. You can select to print notes when you select the shipping request and click **Print**.

System Administrator

These new features or product improvements were made to the System Administrator module.

New features

These new features were added to the System Administrator module.

New business rule sets batch process polling interval

Batch call processing was originally implemented in the January 2021 update (11.21.1) for processing large transaction sets in **Customer Cash Receipt Entry** in a batch process to avoid time-out errors. Since then, it has been made available for several other transaction processing and inquiry functions in Distribution SX.e.

Batch call processing is enabled by selecting the **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**. As the batch process runs, a poller is initiated that tracks the status and logs updates to a database table. This status table is updated when the batch process is requested, processed, completed successfully, or completed with errors. Any errors are reported to the screen.

A new business rule, RequestPollingInterval, can be configured in **SA Business Rule Setup** to override the 5-second interval between polling the batch process to determine if it has completed. You can set a shorter interval to require the poller to check the batch process sooner than 5 seconds. This is useful if a service call normally can complete in a short amount of time, under the 5-second polling time. If the business rule is enabled for a time under 5 seconds, and you run a process where a large set of data is processed, the batch process is run more frequently, but you do not experience the timeout issues.

Product improvements

These product improvements were made to the System Administrator module.

Rule Value field change displays full text

The **Rule Value** field in **SA Business Rule Setup** is changed to a Text Area field, allowing entry of up to 256 characters. This type of field enables the full display of all text specified in the **Rule Value** field, and scrolling is no longer required.

If the full text is not displayed in the **Rule Value** column when you view the list of business rules in the **SA Business Rule Setup** grid, an ellipsis indicator is displayed. You can hold your mouse over the field to read the full text.

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

New features

These new features were added to the TWL module.

Packing list printer selection available for operators

Packing operators are now able to select a specific printer in **TWL Order Packing** instead of the default printer based on the **Carrier Master** record.

This enhancement helps reduce the time spent sorting through printed packing lists at the packing list printers. This also reduces the number of packing operators at the packing list printers because fewer operators will use the same printer. However, if the operator does not select a printer to associate to the packing station, then the packing lists are sent to the printer specified on the **Carrier Master** record.

Feature activation

A new TWL system parameter, 5260-Allow Using Pack Printer, is added enabling the user to select a specific packing list printer instead of having to use the default printer. The parameter defaults as unchecked, meaning the printer specified on the **Carrier Master** record is used.

Value Add

These new features or product improvements were made to the Value Add module.

New features

These new features were added to the Value Add module.

Value Add integration with CPQ enhanced

The Value Add (VA) integration to Infor CPQ is expanded to allow configuration of specific VA products through the Value Add workflow from **Sales Order Entry**. This enhancement ensures that material items are correctly configured and priced during order entry. Previously, you were required to separately configure the tied VA order through **VA Order Entry** after the **Sales Order Entry** process was complete.

After feature activation, when you add a configured VA product to a **Sales Order Entry** order, a tie is automatically created to a VA order for the **Sales Order Entry** warehouse. Both Stock Orders (SO) and Quote Orders (QU) are supported. When **VA Order Entry** displays for the tied VA order, you can click the new **Configure** button in the toolbar to initiate the CPQ configuration. This configuration now updates the tied VA order using inventory components from CPQ and section data from **VA Product Default Setup**. After the configuration is finished, a manual price override from CPQ occurs in the **Value Add Rollup** window. This overrides the sales order line price when you return to **Sales Order Entry**.

A new Configurator section in **VA Order Entry-Header** displays the data returned from CPQ after configuration, for example, **RuleSet**, **Status**, and **ConfiguredPrice**.

You can determine the specification, inventory component, and internal sections of the VA order automatically for configured products in **VA Product Default Setup**. The **VA Product Default Setup** defaults can include multiple IN inventory sections and both EX external and IT internal processes, which allows for more advanced VA work orders.

Feature activation

Activate this feature by selecting **Auto Source CPQ Configurator VA Assembly Type Products** in **SA Administrator Options-Integrations-Configurator Options**.

Products that are configured for CPQ integration require a **Value Add Assembly Type** of **CPQ Configurator** in **Product Setup-General** and require a valid CPQ **RuleSet** in **Product Setup-Cores & Configurator**.

Verify that your initial CPQ integration is set up to automatically advance to **VA Order Entry** from **Sales Order Entry** when a VA line is entered. In **Sales Order Entry-Order Entry Defaults**, select **After Add or Change** in the **Value Add Workflow** field.

The initial integration to CPQ does not change and requires set up in both **SA Administrator Options-Integrations-Configurator Options** and **Product Setup** to establish a link between CloudSuite Distribution and CPQ. Ensure that the correct CPQ configurator templates are installed and configured for VA use. In addition, ensure that the CPQ Rulesets are properly configured to return data to create a VA order.

See the *Infor Distribution SX.e Integration Guide for Infor Configure Price Quote and Enterprise Quoting*.

Product improvements

These product improvements were made to the Value Add module.

Columns added to Value Add entry and inquiry grids

To improve production planning and scheduling efficiency, **Customer Name**, **Ship To**, and **Ship To Name** are now available as columns in the **VA Order Entry** and **VA Order Inquiry-Header Information** grids.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French

- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 10: March 2021 Production Update

This section describes the details of the March 2021 production update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **March 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

Product improvements

These product improvements were made to support EDI documents.

Lockbox processing streamlined

The workflow to process lockbox payments that are received in EDI 820 Payment Order/Remittance Advice documents through ProcessRemittanceAdvice BODs has been improved. You can now access lockbox functions through hyperlinks in the **Electronic Transaction Control Center** (ETCC) and schedule the update process without accessing the **Customer Entry Lockbox Update Report** directly.

When an EDI document is received, the Update Status of the document is WIP (work in process) in ETCC. In the Detail section of the **Transaction Detail** page, these fields are now displayed for documents in WIP:

- **Batch #**
Hyperlink to the **Customer Entry Lockbox Update Report**.

- **Customer #**
- **Check #**

Hyperlink to **Customer Lock Box Entry**.

- **Ready to Process?**

Yes indicates that the document can be scheduled for update. **No** indicates that the document contains errors that must be addressed in **Customer Lock Box Entry** before the update can be performed.

If the document is ready to process, you can click the new **Accounts Receivable - Lockbox Update** button to schedule the update for the batch. Click **Yes** when this message is displayed: *Schedule ARELU Lockbox Update?*. The update is based on stored reports that you set up in **Customer Entry Lockbox Update Report**. After the document is scheduled for update, these updates occur in ETCC:

- The Update Status of the document is changed to Complete.
- The **Batch #**, **Check #**, and **Ready to Process?** fields are no longer displayed.

If the document is not ready to process, you can click the **Check #** hyperlink to access **Customer Lock Box Entry**. If the document is ready to process after you save your corrections, this message is displayed: *Schedule ARELU Lockbox Update?* Click **Yes** to schedule the lockbox update for the batch. If you return to ETCC, you can refresh the page to update the status of the document.

These changes were also made to improve lockbox processing:

- The **Document ID** was added to **Customer Lock Box Entry**.
- The **Payment Reference Number** field on the **Transaction Detail** page in ETCC now supports 30 characters.

See the *Infor CloudSuite Distribution Setup and Administration Guide for EDI*.

Enterprise Printing Platform/Unibar ELS Enterprise

These new features or product improvements were made to support the integration to Enterprise Printing Platform.

New features

These new features were added to the Enterprise Printing Platform/Unibar ELS Enterprise integration.

Enterprise Printing Platform/Unibar ELS Enterprise v10 certified

Distribution SX.e now supports a certified integration with Enterprise Printing Platform (EPP) version 10. EPP replaces Unibar ELS as the barcode label printing solution for the Integrated Barcode, Total Warehouse Logistics, and cartonization functions.

EPP is certified with Distribution SX.e v11.21.3 and later. To integrate an older version of Distribution SX.e with EPP, contact Infor Consulting Services.

Note: EPP version 10 is not dependent on the Adobe Flash platform, which is no longer supported.

See the *Infor Distribution SX.e Integration Guide for Enterprise Printing Platform* and the *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics*.

Infor CloudSuite Field Service integration

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service.

New features

These new features were added to support the integration to Infor CloudSuite Field Service.

Hold release for service orders now synchronized

When you approve a service order on credit hold in Distribution SX.e, the hold on the service order in Service Management is now released. An API call is generated when you approve a service order in **Sales Credit Release Inquiry** or **Sales Order Entry**. When Service Management consumes the API call, the **Credit Hold** option on the **Other** tab on the **Service Orders** form is cleared.

Whether you use legacy or operational hold codes in Distributions SX.e, the API call is generated only when the approval code for order is **y**. If you use operational hold codes, the API call is not generated if you release the credit hold but the order remains on hold for other reasons.

Note: To release hold codes and approve orders in **Sales Order Entry**, you must be granted authorization for the Change Order Created by Service Mgmt authorization point.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service and Infor Service Management*.

Support for warranty claim reconciliation

The integration between Distribution SX.e and Service Management now supports the reconciliation of warranty claims. Use the new **Warranty Claim Reconciliation** form in Service Management to compare the amounts authorized by the vendor for the warranted service with the amounts on the warranty claims. If the amount of a claim exceeds the amount authorized by the vendor, an adjustment, or write-off, is made for the difference. When you create the vendor invoice for the warranty claim in Distribution SX.e, the adjustment amount is posted to an adjustment account.

New General Ledger account fields in Distribution SX.e and updates to the Invoice BOD and BOD processing facilitate the enhancement.

When you submit a warranty claim in Service Management, an Invoice BOD is generated. It includes the value, **Pending**, in the **Invoice Status** field in the Status element of the Invoice BOD. When the BOD is consumed by Distribution SX.e, the existing warranty claim sales order is updated to change the line item prices to zero.

After warranty service work is performed, you can review the warranty claim using the **Warranty Claim Reconciliation** form in Service Management. When you select **Reconciled** in the **Claim Status** field, an Invoice BOD is generated. It includes the value, **Reconciled**, in the **Invoice Status** field in the Status element of the Invoice BOD. If an adjustment was calculated during reconciliation, it is included in the new **WarrantyClaimAdjustment** field in the UserArea of the BOD.

When Distribution SX.e consumes the BOD, an expense invoice is created in **Vendor Invoice Center Entry**. The warranted amount is created as a miscellaneous credit and posted to the new AP Warranty Claim Adjustment account assigned to the **Vendor Setup** record. Adjustment amounts are also posted to the AP Warranty Claim Adjustment account. The warranty claim sales order is updated to include the invoice number.

Note: The **AP Warranty Claim Adjustment** field was added to **Vendor Setup-General Ledger** and **SA Operator Setup-Other Options** for this enhancement. If an account is not provided on the vendor record, then the account from the operator record is used.

These reports were updated to add the AP Warranty Claim Adjustment account and other General Ledger accounts that were not previously included:

- **Vendor Master List Report**
- **SA Operator Information Report**

Feature activation

Select **Enable Warranty Claims Reconciliation** in **SA Administrator Options-Integrations-Service Management**. You must specify AP Warranty Claim Adjustment accounts on **Vendor Setup** or **SA Operator Setup** records.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service and Infor Service Management*.

Product improvements

These product improvements were made to support the integration to Infor CloudSuite Field Service or Infor Service Management.

Authorization point added to Sales Shipping Feedback Entry

The authorization point, **Change Order Created by Service Mgmt**, is now active in several areas in **Sales Shipping Feedback Entry**. It now displays when you select **DETAIL** or **SHIP/UNSHIP** from the main page or the **Quick Ship** page and authorization is not granted. The addition of authorization points in **Sales Shipping Feedback Entry** prevents operators from making changes to orders and those changes not being reflected in Service Management.

Service orders should be maintained in Service Management, which also administers the billing of the service order. After billing information is sent from Service Management in the Invoice BOD, service orders are shipped and invoiced in Distribution SX.e.

You can update a service order in Distribution SX.e, however, this method is not recommended because it requires that you also manually update Service Management.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

New features

These new features affect multiple functions in the application.

Batch call processing enabled for sales order copy

Batch call processing is now available for **Sales Order Entry-Copy**.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, a batch process is initiated when you copy a sales order with a large number of lines. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the copy function to complete without timeout errors.

Note: Batch call processing is available for **Sales Order Entry-Copy** and **Customer Cash Receipt Entry** only at this time.

Product improvements

These product improvements affect multiple functions in the application.

Stage fields enabled for multi-value selection using Extensions

The **Stage** field in these functions now allows for multiple-value selection:

- **Serial # Lookup** window
- Advanced Search section of **Product Extended Serial Number Setup**

If you used the Extension Enablement Toolkit to extend the **Stage**, or `currstatus`, field for either function, review the extension to determine if it requires revision. Runtime errors might occur because the field is now a collection instead of a single string.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

Conversion program removes comma in tax jurisdiction description

A conversion program is now run when Distribution SX.e is updated to remove any commas included in the **SA Sales Use Tax Setup** jurisdiction **Description** field. If a comma is included in the jurisdiction description, it may be associated with an incorrect jurisdiction code, which can result in incorrect taxes being applied on a sales order.

The conversion program is initiated by the Infor Cloud Operations team when the updated version of Distribution SX.e is applied to production cloud tenants.

Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

New features

These new features were added to the Pricing and Discounting module.

Generic product rebate processing supported

You can now enable generic product rebate processing for identical products that are sourced from multiple vendors. Generic product rebate processing bypasses the vendor matching requirement used in standard rebate processing, but uses all other standard rebate processing criteria to determine the best rebate for sale order line items.

When you set up a Level 1 Product, Vendor on Sale rebate record in **PD Pricing Setup**, you are required to specify a vendor. With standard rebate processing, a rebate qualifies for processing if the vendor on the rebate matches the authorized replenishment path (ARP) vendor for the sales order line item. Depending on the type of product, the ARP vendor is determined from the product warehouse record, catalog record, or nonstock sales order line.

With generic product rebate processing, Level 1 Product, Vendor on Sale rebates that meet these conditions qualify for processing:

- The sales order line item matches the product on the rebate record.
- The vendor on the rebate record allows generic rebates.

Vendors that participate in the generic product rebate program are identified in **Vendor Setup**.

In support of this enhancement, the `sxapiAPVendorMnt` and `sxapiAPGetVendorDataGeneralV2` calls were also updated to include the new option.

Feature activation

Select **Allow Generic Product Rebates** in **SA Administrator Options-Products-Rebates**. Then, select **Use Generic Rebates** in **Vendor Setup-Ordering** for those vendors that allow generic product rebates. No changes are required for existing **PD Pricing Setup** records.

Product

These new features or product improvements were made to the Product module.

Product improvements

These product improvements were made to the Product module.

Inquiry of kit component quantity to build enhanced

When inquiring on a prebuilt kit with other prebuilt kits as components, the **Quantity Available to Build** in **Product Inquiry-Components** and **Product Availability Inquiry-Components** now displays the quantity based on the availability of components for the prebuilt kit components, rather than the availability of the kit component on hand quantity.

When the **Expand Pre-Built Kits** option is selected, the components of any prebuilt kit products that are components of the selected kit product are expanded to display on the **Components** view. The **Quantity Available to Build** for the selected kit is based on the availability of the listed components.

If the **Expand Pre-Built Kits** option is not selected, the components of any prebuilt kits that are components of the kit are not displayed. The **Quantity Available to Build** displays the on hand quantity of the prebuilt kit component, rather than its components' availability.

Sales

These new features or product improvements were made to the Sales module.

Product improvements

These product improvements were made to the Sales module.

Sorting by customer lookup name enabled for Sales Order Register Report

You can now sort the **Sales Order Register Report** by **Customer Lookup Name** by specifying L in the **(O)rder#, (C)ust#, (P)rod, (S)lsrep Order, (L)ookup Nm Seq** option when running the report. The data returned is sequenced by Customer Lookup Name. No other calculations or data output are changed.

New option prevents update of tied order cost for specials

During sales order entry when you tie an order to a PO or transfer for a product that was obtained from the vendor as a special product, the received cost is normally carried back to the sales order line. The **Cost Override** flag on the line is set to **Yes**. This cost is used during receiving to update General Ledger Inventory cost. During invoice processing, the new cost on the sales order line is used again to update GL Inventory and balance this account. At issue is the impact on commissions paid to salesreps based on margins. Margins for special products based on receiving cost may be overstated, thus resulting in inflated commissions.

This enhancement adds an SA Administrator option to block the update of the sales order line special product cost during **Purchase Receipt of Inventory Entry** or **Transfer Receipt of Inventory Entry**. Instead, the PO or WT cost is rolled to the internal **Received GL Cost** field on the line. The **Product Cost** on the sales order line is the cost from the inventory record and the **Cost Override** flag is **No**. This ensures the cost on the line only updates the cost used to calculate commissions, as defined in **SA Administrator Options-Products-Costs**.

To ensure that inventory is balanced between PO or transfer receiving and invoice processing, the Inventory control account is still updated with the received cost.

This option applies to lines marked as **Special** on sales orders and tied to purchase orders or transfers, including kit components. The option does not apply to special line items or components tied to KP or VA work orders.

Note: If you selected **Tied Special** or **Both** for the **Use Current Sales Mgr Cost** in **SA Administrator Options-Products-Costs**, the SM Cost is updated during **Sales Entry Invoice Processing Report**.

Feature activation

To activate this feature, select **Do Not Update Tied Order Cost for Specials in PO/WT** in **SA Administrator Options-Products-Costs**.

OE Credit Hold event updated

The OE Credit Hold (oe-credhold) event was updated to accommodate these types of hold code processing:

- Legacy hold codes
You can use the oe-credhold event to receive notification when a sales order is saved with an approval code other than 'y'. The order can be on hold for any reason. The oe-credhold event is used for orders created directly in **Sales Order Entry** or through the OE Full Order Maintenance SXAPI program. If you use the Default Approval Type business rule to set the initial approval type for orders created through the SXAPI program, the approval type from the business rule is honored.
- Operational hold codes

You can use the oe-credhold event to receive notification when a sales order is saved with a credit hold code ('h') applied to the order. The oe-credhold event is used only for orders that are created directly in **Sales Order Entry**. The API Order Error Hold (oe-apierrhold) event is used for orders created through the SXAPI program. The operational hold code for electronically created orders ('e') is applied to the orders, and the approval code is 'N'. The Default Approval Type business rule is ignored.

Note: To receive notifications for other operational hold codes, you must activate the events that are specific to each hold code in **SA Event Manager Activate Entry**.

System Administrator

These new features or product improvements were made to the System Administrator module.

Product improvements

These product improvements were made to the System Administrator module.

User profile column added to Authorization Point Security grid

A new user profile column is added to the Operators grid in **SA Authorization Security Administration-Authorization Point Security**. To access this page, select an authorization point in **SA Administration Authorization Security Setup**, and then click **Point Security (If Blank Operator)**.

The new column allows greater control when setting authorization point security for multiple operators. You can now filter the grid to select all operators with a specific user profile and change their authorization from the **Actions** menu.

Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake:

- apeba
- apebc
- apeia
- apeid
- apeig

In addition, the `cycle_cnt` table is now included with the Distribution SX.e database tables that can be extracted for the Infor Data Lake when you run the **SA Administrator Birst Extraction Report** using the **Data Lake Extract Type**. This table is used for Total Warehouse Logistics reporting in Birst.

SA Tax Address Validation Report name changed

The **SA Tax Address Validation Report** is changed from **SA AvaTax Address Validation Report**. The **SA Tax Address Validation Report** is supported for both the AvaTax and Vertex tax integrations, therefore, the generic name is appropriate.

The report option, **Show Address Returned From AvaTax**, was also relabeled as **Show Validated Address Returned**.

New data archive purge report for ION WL records

A new archive/purge report, **SA Data Archive System ION WL Records Report**, is added to purge ION WL records in these tables:

- esbwlstath
- esbwlstatl
- esbwlcontainer

The records in these tables are created for the integration to CloudSuite WMS (CSWMS) when order changes are sent from CSWMS to Distribution SX.e. We recommend you purge these records periodically.

Additional XML documents processed by data archive report

SXXMLDOC records that have a docStatus of canceled (can) or a docStatus that is blank are now processed by the **SA Data Archive System SXXML Log Tables Report**. SXXMLDOC records are created to monitor SX.API transactions, based on the Create Transaction Audit Records business rule. When you run the report, the SXXMLDOC records are removed from the SXXML log tables unless they are used in the **Electronic Transaction Control Center**.

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

Product improvements

These product improvements were made to the Product module.

Non-labor lines no longer set to lost business after counter sale order

Users are now prevented from setting non-labor lines to lost business after a counter sale order has been dropped in TWL. An error now occurs if a user attempts to set the line to lost business.

New parameter enables automatic allocation of fewest lots required

If lot numbers are not already assigned when an order is dropped to TWL, the preselection of lots now automatically selects the fewest number of lots per location and the lot number for picking. Additionally, during the picking process, if manually selected by the picker, the next predetermined lot location and numbers are then preselected. The assigned lots direct the picker to the least number of lots. This enables the operator to pick from a single lot or the fewest number of lots that can be used if no single lot is able to fill the pick quantity.

This functionality increases productivity and supplies the customer with materials from as few lots as possible, which minimizes the potential for variation in product.

Feature activation

A new TWL system parameter, 7510-Order Drop By Lot Size is added to activate the functionality of automatic lot allocation based on fewest lots required. The parameter defaults as unchecked.

See the *Infor Distribution S.X.e Total Warehouse Logistics User Guide for Picking, Packing, Shipping, and Kitting*.

Vendor

These new features or product improvements were made to the Vendor module.

New features

These new features were added to the Vendor module.

AP freight allocation enabled

You can now use AP freight allocation to define freight terms for customers and vendors, and pass freight charges and tracking information from a vendor's PO to the tied sales order. If the purchase order is linked to a direct sales order, this enhancement can keep the freight billing and tracking properly passed to the customer. This enhancement improves your visibility of sales order costs and increases profit margins. You can also add more robust freight add-on controls based on the type of freight terms used for customer and vendor records.

When AP freight allocation is enabled, freight terms are required for customers and vendors. Because freight charges can be passed from purchase orders to tied direct orders, freight terms are also required in order entry. When AP freight allocation is enabled, the **Freight Terms** field is a required field in these functions:

- **Customer Setup-Ordering** and **Customer Ship To Setup-Ordering**
- **Vendor Setup-Ordering** and **Vendor Ship From Setup-General**
- **Sales Order Entry-Customer Order Settings**
- **Purchase Order Entry-Purchase Order Settings**

A new **Freight Terms Type** can be associated with a freight term. This freight terms type is used to control how freight charges are assigned to sales orders, purchase orders, and vendor invoices in Distribution SX.e. The **Freight Terms Type** is set for each freight term record in **SA Table Code Value Setup**.

Use the **Freight Terms Type** to define a customer or vendor's freight terms as one of these types, or you can leave it blank:

- **Prepay and Add**
Customer: You pay the freight up front, and pass it to your customer with an upcharge.
Vendor: The vendor pays the freight and passes the charges to you, the distributor, on their invoice.
- **Destination**
Customer: You pay the freight and do not pass the freight charge to your customer.
Vendor: The vendor pays the freight, and no freight is charged to you or the customer.
- **Collect**
Customer: The customer pays the freight on their account.
Vendor Ship From Vendor: You pay the freight on an account of your choice.
- **3rd Party**
Customer: The customer designates another company to bill freight charges to (usually a corporate account).
Vendor: You designate another company to bill freight to (usually a corporate account).
- **Pickup**
Customer: The customer picks up the delivery. No freight is charged to customer.
Vendor: You pick up the goods or arrange the pickup and pay your own freight.

Purchase Order Entry

When AP freight allocation is enabled, the **Freight Terms** value in **Purchase Order Entry-Purchase Order Settings** defaults from the **Vendor Setup** or **Vendor Ship From Setup** record, unless overridden. **Freight Terms** is a required field.

When tying an order line to a purchase order, the **Freight Terms** and **Ship Via** values on the **Sourcing** view in **Sales Order Entry-Advanced Line Entry** default from the sales order or the vendor record, depending on the **Freight Terms Type**. The values from the **Sourcing** screen are carried to the new purchase order header.

Sales Order Entry

Freight terms entered for a sales order are used to determine if freight and third-party add-ons from the purchase order should be distributed to the tied sales order. When AP freight allocation is enabled, the **Freight Terms** value in **Sales Order Entry-Customer Order Settings** defaults from the **Customer Setup** or **Customer Ship To Setup** record, unless overridden. **Freight Terms** is a required field.

A new **FreightSA Order Entry Addon Setup**, which identifies the add-on as being a freight type add-on. This option allows Distribution SX.e to correctly update the freight amounts on a sales order. option is added to

Vendor invoice costing

Several modifications were made to these views in **Vendor Invoice Center Entry** to allow for entry and tracking of additional freight related information:

- **Invoice Detail-Create/Update**
- **Purchase Order Header-Create/Update**
- Invoices grid

Modifications are made to **Vendor Entry Group Update/Reconcile Invoices Report** to process the new fields added to **Vendor Invoice Center Entry**. Depending on the **Freight Terms Type**, freight charges can be passed from the purchase order to the sales order for direct orders, populating the actual **Freight** field and including a freight upcharge from **Customer Billing Setup**. When sales order lines are tied to multiple purchase orders, and costed together in a single batch, all freight charges are accumulated into a single freight amount on the sales order.

A new **Packages** view is added to **Purchase Order Inquiry** which displays the purchase order tracking information entered in **Vendor Invoice Center Entry** and updated during **Vendor Entry Group Update/Reconcile Invoices Report** processing.

The SupplierInvoice BOD is updated to include these new elements:

- apei.checkref
- apei.internalref
- apei.mailroomdt
- apei.trackerno1
- apei.trackerno2
- apei.shipviaty
- apei.thirdpartyfreight

Feature activation

To enable AP freight allocation, select the **Enable AP Freight Allocation** option in **SA Administrator Options-Vendors-Invoice Defaults**. The freight allocation fields, tabs, and sections in related functions are available after enhancement activation.

After AP freight allocation is enabled, assign a **Freight Terms Type** for each of your Freight Terms in **SA Table Code Value Setup**. You can also leave **Freight Terms Type** blank. Then, review all customer and vendor records to assign the appropriate **Freight Terms**. When AP freight allocation is activated, the **Freight Terms** field is required in **Customer Setup** and **Vendor Setup**. If you do not assign a **Freight Terms** value, then an error is displayed when you next access a customer or vendor record to maintain it. To exclude a customer or vendor from freight allocation, assign a **Freight Terms** value that contains a blank Freight Terms type. Last, update any existing OE addon freight type records in **SA Order Entry Addon Setup** and set the **Freight** option accordingly.

Orders that were created before AP freight allocation is enabled are processed without errors even if the required **Freight Terms** field is blank in **Sales Order Entry-Customer Order Settings**.

Note: AP freight allocation is independent of the existing **Bill Direct PO Addons** option selected in **SA Administrator Options-Documents-Sales Orders-Back Orders**, which passes invoice addons back to direct orders on an order-by-order basis. We recommend choosing one method to bill purchase order freight addons to customers. If you select AP freight allocation, you can still use Bill Direct PO Addons other than freight.

Product improvements

These product improvements were made to the Vendor module.

Record Limit added to Vendor Change PO Stage Entry grid

A **Record Limit** field is added to the Search panel in **Vendor Change PO Stage Entry**. Use the record limit to restrict the number of records returned when performing a search. If the number of records that match the search criteria exceeds the specified record count, a warning message is displayed. Use additional search criteria to narrow the search results.

Limiting the record count expedites the inquiry process when a large number of records meet the search criteria. It also helps to avoid a system timeout if the number of qualifying records is so high that the search does not complete before timing out.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

Chapter 11: January 2021

This section describes the details of the January 2021 update. This update includes new features and product improvements for CloudSuite Distribution.

See KB article 1960491 to access additional documents for this update. Click the **January 2021** link.

Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

Product improvements

These product improvements were made to support EDI documents.

SXVendorRebateClaim BOD modified to include rebate reference

The **Reference** field on rebate records in **PD Pricing Setup** is now included in the SXVendorRebateClaim BOD. The `pder.ref` element was added to the SXVendorRebateClaim/RebateClaim/Invoice/InvoiceLine section of the BOD. The SXVendorRebateClaim BOD is generated when you run the **SM Rebate Report**.

See *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

Infor CloudSuite Field Service integration

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service.

New features

These new features were added to support the integration to Infor CloudSuite Field Service.

Pick ticket printing for planned materials supported

You can now implement an alternate workflow to print pick tickets for planned material transactions on service orders in Distribution SX.e, instead of Service Management. You can use the standard picking process for Distribution SX.e.

You can print pick tickets using the **Sales Entry Processing Pick Ticket Report** or on demand in **Sales Order Entry**. Pick ticket printing is based on the promised at the header and line levels. The promised date at the header level is the start date of the service order. The promised date at the line level is the transaction date for the planned material transaction.

Pick tickets for planned material transactions show the shipment type from Service Management, either Customer Ship, Customer Return, Inventory Issue, or Inventory Return. Pick tickets can also include the technician truck identifier if the shipment type is Inventory Issue. The technician truck identifier indicates which truck to load with the product. To include truck identifiers on pick tickets, you must set up your trucks as alternate warehouses in **Product Extended Warehouse Cross Reference Setup**. You must also select the new **Service Truck Stock Inventory** option to identify the alternate warehouse as a stocked truck.

The shipment type and technician truck identifier are included on Format 1 print output for pick tickets. If you use Format 4 output, you must map the new fields to your custom pick ticket template.

During print ticket printing, an API call is used to update the service order in Service Management. On the **Service Order Transactions** form, the **Pick List Printed** indicator is selected for the planned material transaction. If the indicator is selected, you can process the service order for invoicing in Service Management. The Invoice BOD is generated, which updates the status of the order to **Shipped** in Distribution SX.e.

If you do not enable pick ticket printing at the system level in Distribution SX.e, you can authorize pick tickets to be printed on demand. Use the new authorization point, **Print Order Created by Service Mgmt**, to authorize users to print pick tickets on demand in **Sales Order Entry** and other functions.

Feature activation

To activate the feature, clear the **Do Not Print Service Pick Ticket** option in **SA Administrator Options-Integrations-Service Management**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.

Default return type can be assigned to dirty cores

You can now select a default return type for a dirty core on a service order. Use the new **Dirty Core Return Type** field in **SA Administrator Options-Integrations-Service Management** to select either **Core Return** or **Core Buy** as the core return reason at the line level.

If you select **Core Return**, you are required to allocate each dirty core return against an order with a corresponding remanufactured product. You must edit the return line in **Sales Order Entry** to allocate the dirty core. An allocation record is then created in **Product Adjust Core Allocation Entry**. You can also view the core allocation at the line detail level in **Sales Order Inquiry**.

You must allocate the dirty core before the service order is processed for invoicing in Service Management. Adapt your current workflow to meet this requirement. If you do not allocate the dirty core before the service order is processed for invoicing, an error occurs when the Invoice BOD is received from Service Management. This message is displayed in **SA ION Inbox/Outbox Inquiry**: Core Allocation Proof Must be Zero to Continue. You must then allocate the dirty core and reprocess the service order for invoicing in Service Management to generate an Invoice BOD.

You can allocate a dirty core against a remanufactured core product on the same order when the order is in **Ordered** or **Picked** stage.

Allocation is not required if you select **Core Buy** or retain the default value, **None** in the **Dirty Core Return Type** field. The processing of dirty cores remains the same as in previous releases.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.

Nonstock products can be sourced through standard replenishment process

Nonstocks and catalog products on service orders can now be sourced through the standard PO replenishment process in Distribution SX.e.

A new option, **Create SX.e Purchase Order**, is available for nonstock or catalog products on a service order in Service Management. If the option is selected, a purchase order is automatically created in Distribution SX.e to source the product. If the option is not selected, the product is included in the **Purchase Entry Recommended Replenishment Action Report** (PO RRAR) in Distribution SX.e. PO RRARs are reviewed by buyers and converted into purchase orders in the **Purchase Demand Center**. Sourcing products through the RRAR process, although not immediate, can yield greater discounts.

In addition to the **Create SX.e Purchase Order** option, these new fields are also available for nonstock and catalog products on a service order:

- **SX.e Product Line**: Allows for better identification of the product
- **Rush Purchase Order**: Corresponds to the **Rush** option on the purchase order header.

The new fields are included in the `ServiceOrder/ServiceOrderLine/ServiceMaterialGroup/UserArea` element of the ServiceOrder BOD, and are consumed by Distribution SX.e.

Feature activation

No activation is required. The process by which nonstocks and catalog products are sourced depends solely on the **Create SX.e Purchase Order** option in Service Management.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management* and the *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

Nonstock cost updates now consumed

If the cost of a nonstock for a planned material transaction is included in the ServiceOrder BOD, it can now be consumed by Distribution SX.e. It is used to update the cost of the nonstock on the sales order and the price of the nonstock on the tied purchase order. Previously, you were required to enter the values manually.

In Service Management, the cost of the nonstock is specified when the catalog or nonstock product is entered. The cost is then displayed in the **Unit Cost** field on the **Service Order Transactions** form. If a **Product Catalog Setup** record was set up for the nonstock in Distribution SX.e, the cost from the catalog record updates the unit cost in Service Management. If the cost was not specified on the catalog record or a catalog record was not set up, user can manually specify the unit cost.

When a ServiceOrder BOD is generated, the unit cost is recorded in `ServiceOrder/ServiceOrderLine/ServiceMaterialGroup/EstimatedCostPriceAmount` element.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management* and the *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

Notification of warehouse transfer receipt automated

If a warehouse transfer was created to source a planned material transaction on a service order, a ReceiveDelivery BOD is now generated when the warehouse transfer is received in Distribution SX.e. After the BOD is consumed by Service Management, these actions occur:

- The posting process for the planned material transaction is initiated.
- The ship quantity, receive quantity, ship date, and receive date values are updated on the line item record on the warehouse transfer and the planned material record.
- If the received quantity equals the ordered quantity, the line item record status is changed to **close**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.

Product code updates product category on sales order lines

The product code on the **Service Order Operations** form in CloudSuite Field Service is now included as a `Pcat` value in the `ServiceOrder/ServiceOrderLine/UserArea` of the ServiceOrder BOD. The product code from the `UserArea` is used as the product category on sales order lines if these conditions are met:

- The product code is a valid product category from Distribution SX.e.
- The value of the `UsePcatOfOperCode` element, which is also in the `ServiceOrder/ServiceOrderLine/UserArea` of the ServiceOrder BOD, is true.

The product code is used as the product category for all sales order line in these sections within the same `ServiceOrderLine` section:

- `ServiceMaterialGroup/MaterialItem/ItemID/ID`
- `ServiceLaborGroup/LineCode`

- ServiceOtherGroup/CostTypeCode

If the product code from the `UserArea` is invalid or missing, the `Pcat` value of the item code in `ServiceOrderLine/ActivityTemplateCode` is used as the product category. The `Pcat` value depends on whether the product code override logic is enabled in CloudSuite Field Service. If the **Account Location** is set to **SRO Transaction**, the override logic is not enabled and the product code for the product on the planned material transaction is used. If the **Account Location** is set to **SRO Operation**, the override logic is enabled and the product code that is specified on the operation is used. It must be a valid product category in Distribution SX.e. If it is not a valid value, the product code that is related to the operation code is used.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service* and the *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

Infor Distribution Proof of Delivery CE

These new features or product improvements were made to support the integration to Infor Distribution Proof of Delivery Cloud Edition.

New features

These product improvements affect version 21.x of Infor Distribution Proof of Delivery CE.

New configuration setting enables grid filtering

A new configuration setting in the Proof of Delivery Managers application can be activated to enable filtering of grid columns.

When the setting, **datagridFilteringEnabled**, is set to `true` in **Admin-Settings**, filtering options are available for all grids in the Managers application.

The type of filter available depends on the values in the column, for example, text, integer, checkbox, or date. Each type of filter offers several filter options, such as **Contains**, **Starts With**, or **Equals**. You can select **Clear Filter** from the grid options list to reset the filters to their default settings. Some filters offer a selection of values in a drop-down list. You can select the top, blank value to select all records, without applying that filter.

When filtering is enabled, the need to specify search criteria is eliminated in most cases. Search panes are removed in all grid views with the exception of the **Deliveries** view. The **Container ID** and **Manifest ID** cannot be added as grid columns, so these fields remain in the Search pane.

In some cases, a grid column does not have a filter. This is because the data is already filtered for that specific field and a filter is not necessary. For example, the Status column on the **Assign Route** screen always displays **Assigned**.

Feature activation

Set the system configuration setting **datagridFilteringEnabled** to **true** in **Admin-Settings**. The Managers application is reloaded automatically, and the filtering options are added to grids.

See the *Infor Distribution Proof of Delivery Managers Application Administration Guide*.

Infor Distribution Storeroom CE

These new features or product improvements were made to Infor Distribution Storeroom Cloud Edition.

New features

These new features were added to Infor Distribution Storeroom CE.

BOR product vendor returns support serial and lot processing

You can now return Bill on Receipt (BOR) products with serial or lot control numbers to vendors, using these existing workflows:

- **Return issued product to the vendor**
When a customer returns an issued BOR product, you create a sales order return (OE RM) with a tied purchase order return (PO RM). The serial/lot control number is selected on the OE RM, and the returned quantity is automatically moved from the Customer On Hand balance to the Distributor Unavailable balance when the OE RM is invoiced. During PO RM receipt, the serial/lot control number from the OE RM is selected again, and the receipt quantity is removed from the Distributor Unavailable balance.
- **Return an inventory product to the vendor**
This type of return is not initiated by a customer return. You might return inventory products from a Storeroom warehouse because you received incorrect or damaged products.
When you create the PO RM, a tied OE RM is automatically created. The control number is not included on either of the documents. After the OE RM is invoiced, inventory is automatically moved from the Customer balance to the Distributor Unavailable balance. In Storeroom, you must then manually move the BOR product to unavailable inventory. Specify the control number during the inventory movement. During PO RM receipt, specify the control number from the inventory movement. When the PO RM is received, inventory is removed from Distributor Unavailable balance.

View product balances and availability on these tabs in the Storeroom **Product Inquiry** function:

- **Product Detail**
- **Whse Availability**
- **Lots or Serials**

In Distribution SX.e, you can view product balances in **Product Warehouse Product Setup**. Information about product availability is also shown in these functions:

- **Product Unavailable Inventory Entry**

- **Product Extended Serial Number Setup** or **Product Extended Lot Number Setup**

When a serial-controlled product is returned to the vendor, the status of the product in **Product Extended Serial Number Setup** is **Retired**.

Saving issues and returns as drafts

You can now create draft versions of issues and returns. You can edit and save a draft multiple times before you submit it. You can also delete a draft. To save an issue or return, click the new **Save Draft** button on the **Issue** or **Return** window. You can access the drafts from the **Issues & Returns** menu.

See the *Infor Distribution Storeroom CE User Guide*.

Product improvements

These product improvements were made to Infor Distribution Storeroom CE.

Assigning serial numbers on purchase order returns

If these criteria are met, you can now access the **Serial** button to select serial numbers when you receive serial-controlled products on a return merchandise purchase order (PO RM):

- The product was issued, or sold, to the customer.
- The serial number was assigned to the product when the product was issued to the customer.
- The PO RM is tied to a return merchandise sales order (OE RM) that was created when the customer returned the product to Storeroom.

When processing products that were assigned a serial number at sale on a PO RM, you must select the same serial numbers that were specified on the OE RM.

See the *Infor Distribution Storeroom CE User Guide*.

Infor Document Management integration

These new features or product improvements were made to support the integration to Infor Document Management.

Product improvements

These product improvements were made to support the integration to Infor Document Management.

Credit data added to Invoice output for Format 4

Credit data is now included on the Invoice form when a credit memo is applied to an invoice.

For invoices printed as Print Format 4 (IDM and 3rd party), these elements are now included in the Invoice form's XML output:

- CreditAppliedLabel
- CreditApplied
- RemainingCreditLabel
- RemainingCredit
- NetAmountDueLabel
- NetAmountDue

The new elements are added to the Invoice form below the Invoice Total.

These invoice templates are updated to include the new elements:

- SXInvoiceTemplate
- SXConsolidatedInvoiceTemplate_Order
- SXConsolidatedInvoiceTemplate_Product

Note: The RemainingCredit element is included on the SXInvoiceTemplate only.

To use the updated invoice templates, download the `IDM_SX_Content_11.20.12.zip` file from KB 1887404. The zip file contains an updated `IDM_SX_Configuration.xml` file that must be imported in the IDM Control Center.

See the *Infor CloudSuite Distribution Configuration Guide* for instructions for downloading and importing form templates in IDM.

Note: If you have customized your Invoice forms, you must change your templates to manually add the new credit detail elements. Instructions for customizing your Invoice form to include these credit data elements are attached to KB 2173970.

Miscellaneous

These new features or product improvements affect multiple functions in the application.

New features

These new features affect multiple functions in the application.

Batch call process implemented for large transaction processing

When processing large numbers of transactions, some processes do not complete within the application's 1-minute time-out constraint, and you receive time-out errors. A new process can be implemented to

accommodate these service calls allowing them to complete and return data outside of the 1-minute time frame.

The new batch process is available in this version for **Customer Cash Receipt Entry** by selecting a new option in SA Administrator Options. When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, the new batch call process is implemented in **Customer Cash Receipt Entry** when these processes are initiated:

- Transaction grid is loaded
- **Auto Apply** of invoice payments is selected
- Invoices are marked and applied as **Paid in Full**
- **Original Discount** is selected to reset transaction discounts to their original values
- **Reset** is selected to reset selected transactions to their original values
- Final Update is performed

As the batch process runs, a poller is initiated that tracks the status of the batch call using a database table that is updated as the batch process progresses. This status can be requested, in process, completed successfully, or completed with errors. If there are errors, a message is displayed to the screen with the specific error. When the status is completed successfully or completed with errors, the poller stops for that specific call and processing continues as normal.

The batch process is available for **Customer Cash Receipt Entry** only at this time. Infor shall review other transaction processing service calls in Distribution SX.e to determine where the new batch process would reduce time-out issues for large transaction sets.

Feature activation

The batch process must be activated by setting the **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**. We recommend you select this option if you process very large transaction sets in **Customer Cash Receipt Entry** and experience time-out errors.

Note: Any value specified in the **Batch Size** field in **SA Administrator Options-Customers-Cash Receipts** is ignored if this new option is selected.

Product improvements

These product improvements affect multiple functions in the application.

Client date and time added to report headers

The client system date and time is now added to the report header and is displayed to the left of the server date and time on all reports. The server time is noted with the label **server:**. The client is the operator running the report.

Reports that open GL journals now display the client date and time in open journal warnings, as in this example:

```
WARNING: Journal #:nnnnnnn is Currently Open for  
Function: OEET Operator: gc Date: 12/15/20 Time: 11:39 Client: 12/15/20 12:39:00.000-06:00
```

The additional client date/time for open journal warnings is included on these reports:

- **Customer Trial Balance Report**
- **GL Administrator Change Account Number Report**
- **GL Balance Order Entry Report**
- **GL Balance Purchase Order Report**
- **GL Balance Transfers Report**
- **GL Budget Master List Report**
- **GL Trial Balance Report**
- **Product Trial Balance of Stock Inventory Report**
- **Vendor Trial Balance Report**

The client date/time is recorded when you select the **Use Client Time Zone to Load Date/Time on System Records** option in **SA Administrator Options-System-General**.

Note: Any dates and times saved before this change are assumed to be the server's time. All dates/times are adjusted to the time zone of the operator running the report.

Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

New features

These new features were added to the Pricing and Discounting module.

Product costs based on vendor contracts supported

The product cost on a sales order line can now be calculated from sales cost values on Level 1-4 **PD Pricing Setup** records. Sales costs reflect the cost of products based on your vendor contracts. A sales cost is used as the product cost when the pricing record is applied to a sales order line.

You can include a sales cost on these types of pricing records if the pricing record is based on a cost-related value, such as cost, margin, rebated cost, or rebated margin:

- Customer/Product (Level 1)
- Customer/Product Price Type (Level 2)
- Customer Type/Product (Level 3)
- Customer Type/Product Price Type (Level 4)

The sales cost can be a fixed amount or a percentage of one of these product values:

- Base or list price
- Replacement or standard cost

You can specify a percentage on Level 1-4 pricing records, but you can only specify a fixed amount on Level 1 and 3 pricing records. The sales cost is calculated from these new fields in **PD Pricing Setup: Sales Cost, Sales Cost Based On,** and **Sales Cost Amount.**

Typically, the product cost is determined by settings in **SA Administrator Options-Products-Costs** and is based on values from **Product Warehouse Product Setup** records. If a sales cost is applied to a line, it is not considered an override of the cost that is based on a **Product Warehouse Product Setup** record. A sales cost can be applied to a sales order line whenever line pricing occurs, including line creation through BODs, API calls, and imported spreadsheets.

If a sales cost was applied to a special line or direct order line, it is not updated when the tied purchase order or warehouse transfer is received. Instead, the cost from the receiving line is saved internally and is used to calculate GL cost during invoice processing.

If you use the pricing worksheet in **Sales Order Entry** and **Sales Customer Pricing Inquiry**, the sales cost affects pricing calculations if you apply Cost + or Margin % pricing. Additionally, as part of this enhancement, the percentage fields for Cost +, Margin, and Discount on the pricing worksheet now support four decimal places.

In support of this enhancement, the `sxapiPD PricingMnt` call, which is used to create or maintain pricing records, now includes the new sales cost fields. Additionally, you can extract the sales costs values from pricing records to the Infor Data Lake using the **SA Administrator Birst Extraction Report**. Updates were also made to these functions:

- **PD Mass Maintenance Entry**
- **PD Customer Pricing Master List Report**
- **Sales Order Audit Report**
- **Data Conversion PD Customer Pricing PDSC Reports**

Feature activation

To activate the feature, select the **Use Sales Cost** option in **SA Administrator Options-Products-Pricing.**

Product

These new features or product improvements were made to the Product module.

New features

These new features were added to the Product module.

Customer forecasting enhancements

Using customer forecasting, you can accommodate anticipated new sales in addition to the actual usage for the previous 25 months when you factor anticipated volume and its effect on purchasing recommendations for the next 12 months. When you use customer forecasting, the total forecast quantity to purchase for all

active forecasts is included in the purchasing recommendations of the **Purchase Entry Recommended Replenishment Action Report** and the **Transfer Entry Recommended Replenishment Action Report**.

However, these reports currently only review forecasts for periods specified when the replenishment functions are run. They do not consider forecasts outside of the date range for which the reports are run. This does not allow distributors to procure inventory needed when customer forecast periods start, especially for products with longer lead times.

This enhancement adds controls to allow consideration of product lead times for products when calculating the impact of customer forecast usage on PO and WT replenishment recommendations.

Two new options are added to **SA Administrator Options-Products-Replenishment** to be used by **Purchase Demand Center Entry** and **Transfer Demand Center Entry** when you run a replenishment report. When **Include Lead Time** is selected, a product's lead time is added to the current date when searching for active customer forecasts to include in the replenishment report. In addition, the **Product Line Setup Review Days** value is not included when calculating a quantity to purchase. Instead, lead time is factored in when calculating the days until the end of the forecast, and the quantity to purchase is the remaining forecast quantity or the estimated monthly forecast, whichever is less.

A second option, **Ramp Up Days**, can be used to specify a number of days to add to the calculated forecast date when searching for active forecasts. This is optional and is recommended when products have particularly long lead times.

The current restriction in **Product Customer Reservation/Forecast Setup** preventing more than one active forecast for a specific forecast type and customer/ship to/warehouse combination is removed. You can create multiple forecasts in this case, but the begin and end dates must not overlap.

Feature activation

New options are added to **SA Administrator-Products-Replenishment** to enable this feature:

- **Include Lead Time?**
- **Ramp Up Days**

If **Include Lead Time** is not selected, lead times are not added to the start and end dates when searching for active forecasts, and the calculations used to determine the quantity to purchase for forecasts is unchanged.

Product improvements

These product improvements were made to the Product module.

Cost/Price added to Product Inquiry-Transactions grid

A new **Cost/Price** column is added to the **Product Inquiry-Transactions** grid to display either the cost or price associated with each transaction. If the transaction is a sales order, the value displayed in the column is the price of the product from the sales order line. If the transaction is any other type, the value displayed in the column is the cost of the product from the GL entry made when the product was purchased.

Cost is per stocking unit, and includes any PO add-ons or the SM/GL cost. Cost is shown in domestic currency.

Note: If an item is a special cost/price item, the cost represents the cost per special price/cost unit, not per stocking unit. This is referred to as the 'raw' cost.

Feature activation

The Cost/Price column is visible to operators with either **Allow Entry** or **Allow Viewing Only** selected in the **Price Discount Info** field in the OE/PO Entry Options section of **SA Operator Setup-Entry Options**.

Project Job Management integration

These new features or product improvements were made to support the integration to Project Job Management (PJM).

Product improvements

These product improvements were made to support the PJM integration.

Project Job Management v3.21.1 certified

CloudSuite Distribution now supports a certified integration with Project Job Management (PJM) version 3.21.1. PJM is an MVPP application that manages small contract bids and large commercial jobs. PJM runs on your client system and can be integrated with CloudSuite Distribution by using ION API.

See the *Infor CloudSuite Distribution Integration Guide for Project Job Management*.

Sales

These new features or product improvements were made to the Sales module.

Product improvements

These product improvements were made to the Sales module.

Delivery note option added for sales order notes and comments

You can now specify a product note, catalog note, or line comment to print on a Delivery Document in **Sales Order Entry** from notes and comment entry functions. The **Delivery** option is added to the Notes context application and can be selected when you add notes to a stocked or catalog product on a line. You can also

select the **Print On Delivery** option in the **Comments** window to print line comments on the Delivery Document.

The **Delivery** option is only available in these situations if you are printing your Delivery Documents as Format 4. Print Format 4 is selected in **SA Administrator Options-Documents-Sales Orders-Printing** in the Delivery section. Print Format 4 generates XML output for Infor Document Management or a third-party forms printing application.

Dirty core allocation allowed for picked orders

You can now allocate a dirty core product against a remanufactured core product on the same order when an order is in Picked stage. Previously, you could only allocate a dirty core if the order was in Ordered stage. This improvement addresses a timing issue that can occur if the order is processed by the **Sales Entry Pick Ticket Report** before the dirty core is returned and added to the order.

System Administrator

These new features or product improvements were made to the System Administrator module.

Product improvements

These product improvements were made to the System Administrator module.

Security Flags section of SA Operator Information Report updated

The Security Flags section of the **SA Operator Information Report** is updated to include all Security Flags settings and fields from **SA Operator Setup-Entry Options**, **SA Operator Setup-Controls**, and **SA Operator Setup-Other Options**.

Additionally, the report layout was updated to resemble the layout of **SA Operator Setup** and to widen its page formatting from 80 characters to 132.

Conversion program to purge all BODs after 180 days

A conversion program is now run when CloudSuite Distribution is updated to purge all inbound and outbound BOD records in the ION inbox/outbox, regardless of status, that are older than 180 days. The conversion program is initiated by the Infor Cloud Operations team when updated versions of Distribution SX.e are applied to production cloud tenants.

This is to prevent the inbox/outbox from filling up with BOD records and impacting system performance.

This automatic purge process is in addition to the conversion program added in version 20.12 that purges successfully processed (inactive) inbound and outbound BODs older than 60 days.

Progress logs for tenant data import sent every 30 minutes

When the **SA Tenant Refresh - Data Import Report** is run, a log that shows the progress of the import is emailed every 30 minutes. If report output is sent to an email address, based on the **Print Type** field on the report's **Information** page, the log is sent to that email address. If report output is not emailed, the log is sent to the email address on the **SA Operator Setup** record for the user who ran the report.

See the *Infor CloudSuite Distribution Configuration Guide*.

Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake:

- counthistory
- gleb
- pick
- vaelo
- vaesl

Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

Product improvements

These product improvements were made to the Product module.

Products with immediate shipping prioritized in cross docking

Products that require immediate shipping are now being placed in cross dock zones near the shipping dock. This reduces products being staged in the cross dock zones by only staging products with prioritized shipping. New functionality has been added to give warehouse personnel control of the number of days forward from the promise date they would like to cross dock material.

Previously, all cross-docked products on sales orders and warehouse transfers had been consolidated into cross dock zones regardless of their due dates. Additionally, you can now mix cross dock zones onto a single pallet. This can reduce the number of pallets needed in your cross-dock area.

Feature activation

A new TWL system parameter, 6266-Cross Dock - Days Forward, is added to activate the days forward functionality from the promise date as required. The parameter defaults as zero, which means there is no date limit. An additional TWL system parameter, 6267-Cross Dock - Allow Zone Mix, is added to activate the

zone mix of pallets destined for cross dock locations. The parameter defaults with no effect on current restriction setup.

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Receiving and Putting Away*.

Warehouse zone performs validations during updates

Validations are now being performed in **TWL Configuration-Warehouse Zone** during the update of a zone record. Previously, validations were not being performed during the add procedure to ensure you were not changing the pick and putaway sequences another zone had.

Cross docking prompts consistent after first partial receipt of inventory

Cross dock prompts are now consistently displaying during product inventory receipts. When calculating cross dock quantity, it now takes into account receipts that are waiting in **WL Transaction Inquiry** for **WL Entry Batch Receiving** and only sums up totals already in cross dock for receipts that have not been closed.

Transfer

These new features or product improvements were made to the Transfer module.

Product improvements

These product improvements were made to the Transfers module.

New columns added to Transfer Demand Center grid

To provide more information relevant to reviewing suggested transfers, these new display-only columns are added to the **Transfer Demand Center Entry-Line Items** grid:

- Purchasing Net Available
- Sales Net Available
- Order Point
- Usage Rate
- Standard Cost
- Transfer Package Quantity
- Vendor Package Quantity
- Warehouse Rank

These values, except for Sales Net Available, are from the **Product Warehouse Product Setup** record in the ship to warehouse. Sales Net Available is from the **Product Warehouse Product Setup** record in the ship from warehouse.

Additionally, these display-only columns are added to the Surplus grid in **Transfer Demand Center Entry-Line Item-Edit Details**:

- Line Point
- Sales Net Available

Both Line Point and Sales Net Available are from the **Product Warehouse Product Setup** record in the ship from (surplus) warehouse.

Vendor

These new features or product improvements were made to the Vendor module.

Product improvements

These product improvements were made to the Vendor module.

New warning when default group selected

During **Vendor Invoice Center Entry**, if you click **Search** to view invoices in all groups and then click **New Invoice**, you can create an invoice without specifying a group. In this case, the first group found is defaulted in the **Group** field. A new message is displayed in this case: Since no group was entered, the first group found can be defaulted. Please confirm to proceed with using Group (xxxx). You can click **Yes** to use the defaulted group, or **No** to specify a group.

Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

The Distribution SX.e online help is available in these languages:

- Canadian French
- English

Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.